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THE DOMINION OF CANADA AS A MARKET FOR BRITISH GOODS

Published in London (England), 1922

THE DOMINION OF CANADA AS A MARKET FOR BRITISH GOODS

Being a General Survey of the Canadian Market under post-war conditions, from the point of view of the British exporter and of the manufacturer contemplating the development of branch factories overseas ; with special reference to the opportunity created for British competition with American manufacturers as the result of the new United States Tariffs on Canadian exports to that country

WITH INTRODUCTIONS BY
SIR W. PETER RYLANDS

President (1920 & 1921) of the Federation
of British Industries

AND

STANLEY MACHIN

President of the London Chamber
of Commerce

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NOTE BY THE PUBLISHERS

The information set forth in this publication has been prepared for us by a gentleman of considerable experience in connection with Canadian trade and commerce, for many years in the service of the Dominion Government, who takes this method of drawing the attention of British firms to the prospective opportunity when trade revives of replacing by British goods much of the vast importation of American manufactures which has hitherto been so prominent a feature in the Canadian market.

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INTRODUCTION

By Sir W. PETER RYLANDS, President of the
Federation of British Industries, 1920 and 1921.

To help to stimulate trade relations between the United Kingdom and the various units of the British Commonwealth is one of the most worthy of tasks that can be undertaken by a member of the British peoples.

I welcome the appearance of this book at the present time, and hope it will be read by manufacturers and traders in all parts of the Empire.

A fruitful and healthy trade condition is the strongest bond for securing Imperial unity. The mutual benefits and prosperity gained by such a condition are the surest guarantees for the increasing influence of British civilisation throughout the world.

All men and women in the British Isles must look with pride and admiration at the rapid advance of the great Dominions. Their thriving and expanding industries are the promise of a great future.

Although the United Kingdom is more densely populated and in a state of higher industrial and financial organisation, yet the day is not far distant when the greatness of the British Empire will be mainly concentrated in the new, vast countries overseas.

At the present day we in this country are dependent upon supplies of food and raw material from overseas. It would not be possible for us to maintain our enormous population and keep our factories working without excellent trading conditions with these new countries of the world.

Canada is geographically in a favourable position

for an interchange of sea-borne trade with this country. The greatest of England's commercial ports are facing towards or have easy access to the Atlantic, on which ocean Canada possesses the majority of her finest harbours.

All that can be done to open the eyes of our people to the great possibilities of inter-Imperial trade is of the highest importance, and I sincerely hope that the traders and manufacturers of this country will find profitable inspiration and instruction in the pages of this volume.

A handwritten signature in black ink, reading "W. Cecil Stanger". The signature is written in a cursive style with a prominent initial "W" and a long, sweeping underline.

INTRODUCTION

By **STANLEY MACHIN, J.P.** President of the
London Chamber of Commerce.

HAVING been Chairman of the British Imperial Council of Commerce, and also of the Organising Committee of the Congress of Chambers of Commerce of the Empire held at Toronto in 1920, I welcome the enterprise of the publishers of this handbook, which treats of the advantages of the Dominion of Canada as a market for British goods under post-war conditions.

During my visit I had exceptional opportunities of meeting the leaders of finance, commerce and industry in the Dominion, and gaining first-hand information regarding the possibilities of a larger exchange of commodities between Canada and the United Kingdom. I was convinced that, notwithstanding the geographical contiguity of the Dominion to the United States and its economic consequences, there was a substantial basis for the further development of the export trade of the United Kingdom to the former, as well as for the establishment of branch factories by British capitalists, especially in districts where cheap power could be derived from the Niagara River and other waterways. Openings for the investment of British capital were everywhere apparent. Of course, it was no surprise to find how vast were the resources of the Dominion in products of all kinds, especially foodstuffs, timber, minerals, wood pulp, etc., exchangeable for British goods. The facts and the figures of production and

export were well known in this country, and their importance was only accentuated by actual observation of the country and contact with its virile population. We had proof also of what Canada had done in ministering to the enormous and continuous needs of the Allies during the war, and of her increased productive capacity developed thereby when the peace period arrived. Largely extended activities may have been arrested by the same factors which have since affected so prejudicially the economic situation both in Europe and the United States, but the illimitable possibilities of the future remain, and must in the long run conduce, when exploited, to the advantage of the British Empire and the Mother Country in particular.

Several of the Delegation to which I belonged were greatly impressed from personal observation with the fact that amongst Canadian buyers there was a genuine preference for British goods, partly on the ground of quality, and partly from the sentimental consideration that they were British. This is a consideration that should always be borne in mind. As showing that it is a practical one in Canada, I quote from a speech in September, 1920, by Sir James W. Woods, an ex-President of the Toronto Board of Trade :—

“ Now we welcome the delegates of the Ninth Congress because their main purpose, as I understand it, is to see that all efforts are made to the end that every dollar's worth of goods imported by any part of the Empire shall, so far as possible, be got within the Empire. In the case of Canada, we must confess, there is room for improvement. In the past twelve months we imported from the United States goods to the amount of \$802,102,000,

getting on for 100 dollars per head of our population. We bought from the United States during the past year nearly five dollars' worth of goods for every one dollar's worth that we bought from Great Britain. We bought from the United States nearly twice as much as they bought from us, while from the Motherland we only bought one-quarter of the amount she bought from us. This is not right. Now, an analysis of the classification of our returns shows that improvements can easily be brought about. How? By tariffs? Well, we know that the preferential clauses in the Canadian tariff did improve trade between Britain and Canada. I know that from my own business; but I believe much more would be accomplished by arousing a real Empire spirit for the purposes of business, as we had it in connection with the war, and we welcome the Congress to Toronto because we believe it may help us to arouse such a spirit."

The question therefore arises, How can these aspirations be best translated into action on both sides of the Atlantic as and when favourable opportunities occur? To this an answer will be found in the pages of this volume, which, unlike the ordinary official publications in form and substance, sets out generally and particularly the main considerations which enter into the problem of British-Canadian commercial relations in the future. Private or individual effort; closer contact between buyer and seller, assisted by capable intermediaries; a recognition of the value and limitations of Government intervention; the utilisation of existing organisations; a careful study of local conditions based upon correct and practical information—

all these and other factors are comprehensively treated. There is clearly large scope in Canada for all forms of business enterprise, and it is noteworthy that the author appreciates the possibility of British merchants, who have done so much to develop trade in other parts of the Empire, becoming more potent auxiliaries in advancing the interests of the Canadian producer as well as the British manufacturer, than has been the case in the past. Other times, other methods.

I wish this handbook all success, and commend it to the perusal of any one who is concerned in the extension of business in and with our Great Dominion.

Stanley Machin

THE DOMINION OF CANADA AS A MARKET FOR BRITISH GOODS

CHAPTER I

THE CANADIAN MARKET BEFORE THE WAR—AND AFTER

WHILE to a small country like Great Britain, possessing a comparatively large population with an unusually high proportion of skilled industrial workers, but deficient in domestic sources of food supply and of the raw materials of industry, a large foreign trade was even prior to 1914 a matter of necessity, the destruction of a large part of her capital during the war, and particularly the realisation on a large scale of her investments overseas, renders the expansion of her imports and exports to-day a matter of the greatest moment. British firms, therefore, whose trade was interrupted during the war and very largely lost to them and to the Mother Country as one of the results of the mighty efforts put forth during the period of hostilities, will during the coming lean years for the world find it incumbent upon them to leave no stone unturned to develop their sales of manufactured articles, the lack of which is so much in evidence in many of our former markets. From the proceeds of such sales the Mother Country must purchase those stores of food and raw materials much of which previous to 1914 was derived in the form of interest on capital sent abroad in the years of prosperity and on the returns

from services rendered by her mercantile marine. British trade in some of her former markets must for some years to come be carried on under many difficulties, and her sales to countries in Europe in particular must for long be on a very restricted scale. Trade policy will, therefore, direct exporters to those markets which have suffered least in the war, whose peoples, in fact, have gained in wealth in comparison with those of other countries, and whose production of foodstuffs and raw materials necessary to the life of the community renders them permanent and increasing purchasers of the manufactured goods turned out by the industrial nations of the world, and especially by Great Britain. British exports will, therefore, on the whole, flow largely to those countries whose currency is at a premium as compared with the sovereign, and whose industries are mainly concerned with the production of "primary products," such as grain, live stock, timber, minerals, etc., the demand for which is subject merely to the fluctuations in the prosperity of the world as a whole rather than to matters of taste and changing fashion; to new countries, in fact, like the Dominion of Canada, whose progress, though possibly arrested, has not been materially damaged by the seven years of mad destruction through which the peoples of the world have passed.

The Canadian market was prior to the war a valuable one to those firms whose products were in demand by its people, and whose methods of business enabled them to satisfy the particular needs of their Canadian customers. British textiles, for instance, predominated over all competition, both domestic and foreign, and the dry goods houses of the United Kingdom have, on the whole, experienced but little difficulty in reopening connections severed during the war and in selling goods to customers whose shelves lay almost empty when the bugles of the warring nations sounded "Halt!" in November, 1918. Prior to the war, however, there

was a conviction very prevalent among business men in the United Kingdom that the Canadian market was a difficult one to work, that Canadians were very much "Americanised," in fact, and that competition with the glib salesmen from across the border was either impossible or so difficult as to be hardly worth the trouble when so many far more easy markets existed in other parts of the world. The era of speculation which closed with the outbreak of war, the over-construction of railways and the continual call for more capital from overseas necessitated by this boom in spending, resulted in the burning of some fingers, though for the most part those of persons who could, by exercising more care in connection with their investments and by consulting the many sources of reliable information open to prudent inquirers, have escaped the loss and disillusionment which eventually confronted them.

With the outbreak of war in 1914 came a remarkable transformation in the economic and political life of the Canadian people, who, as the whole world now knows, were British to the core, and resented as keenly as did the inhabitants of the United Kingdom the insidious suggestion of German publicists that questions of interest or even the inborn determination of the people to safeguard the autonomy of the Dominion in political affairs could detach them from that common British citizenship which the Torontonian and the Montrealer (whether French or English-speaking) prizes in a measure at least equal to that of the man of Kent or Cumberland. The call to arms was responded to with electric enthusiasm throughout the Dominion, and when during the Fall of 1914 it became evident that the supply of munitions of war for the fighting forces would be beyond the unaided powers of the Mother Country, immediate steps were taken in Canada to develop the production of shells and other war material in the factories of the Dominion. The production of munitions of war in Canada was of enormous value to

the Allied cause, and what was done in that connection was a revelation not only to the Government departments at Whitehall, but also to the people of Canada, whose latent powers of organisation and production were utilised to the utmost limit to turn out articles of necessity to the British, Canadian and Allied armies. In the matter of shells alone some 2,114,072 tons of steel were used in Canadian factories, and of this 1,937,385 tons was produced in Canada as against only 186,687 tons imported from the United States. The production of foodstuffs was also immensely stimulated, in spite of the continual drain on the country's man-power, and the people of Canada developed habits of saving which produced remarkable results in the direction of subscriptions to War Loans, the accumulation of bank deposits which enabled the financiers of the Dominion as well as the Canadian Government itself time after time to make advances to the British authorities for the purchase of foodstuffs, munitions, ships and other material needed for the prosecution of the war in Europe and elsewhere.

The remarkable development of the Canadian ship-building industry in connection with the orders received by the yards from the Imperial Munitions Board constituted a difficult problem for the Canadian authorities as soon as war necessities had been met and orders for these craft began to fall off, as many men had been trained as shipbuilders and much capital had been invested in the industry. However, the great scarcity of tonnage in the world resulting from submarine action provided the justification needed by the Dominion Government for rendering support to the industry, and it was decided to embark upon the construction of a fleet of cargo-carrying vessels which should be utilised on completion for the transportation of Canadian goods to the war zone or elsewhere according to the necessity of the moment when delivery from the yard took place. The first contracts were awarded in the early part of 1918, and

up to the end of 1919 contracts for fifty-three cargo vessels with a tonnage of 320,000 dead weight had been awarded, this being later expanded to a total fleet of sixty-three vessels representing a tonnage of 393,000. The completion of this fleet took place, of course, some time after the conclusion of the Armistice, but it must be remembered that in the efforts made by Canadian manufacturers to carry out the immense contracts for war material much capital was expended by them on the enlargement of their manufacturing facilities, many new plants being constructed for one purpose or another. The possession of these new and up-to-date factories at the close of the war rendered it a matter of urgency that markets should be found for the various products turned out therein, and in the development of these foreign markets the Canadian Government Merchant Marine has played an important part. The vessels constructed for war necessities now bear Canadian-made goods to ports in every ocean, the ships reaching London, Liverpool, Glasgow, Cardiff, Swansea and Newport in the United Kingdom, and connecting Eastern Canadian ports with Newfoundland, the West Indies, Cuba, British Guiana, Australia, the eastern coast of South America, Spain, Egypt and other Mediterranean countries, India, the Straits Settlements and Java. From Vancouver, B.C., several vessels proceed on routes reaching Japan, China, Java, the Straits Settlements, India, South Africa, Australia and New Zealand and South America; and there are services from the Pacific to the Atlantic ports *viâ* the Panama Canal, Western Canada wheat having also been brought to Europe *viâ* the Panama Canal. The services of the C.G.M.M. are operated in harmony with those of existing shipping concerns, the latter in some cases acting as agents for the collection and distribution of traffic carried by the Government steamers. Steamship connections under private auspices have also developed very considerably since the conclusion of hostilities, and, among others, the scattered units of

the Canadian Pacific Steamships, Ltd., which performed valuable war work during the period of hostilities—many, unfortunately, being lost by submarine and other enemy action—have been brought together again once more to become part of a railway and steamship system which has no superior in the world for efficiency. The Canadian Pacific passenger and cargo steamers connect Quebec and Montreal or, in winter, St. John, N.B., with Liverpool, London, Glasgow, Southampton, Bristol, Antwerp, Genoa and Naples ; and from Vancouver there is a fast route to Japan and China and another to New Zealand and Australia. British and Irish ports are served from Canada not only by the C.P.S. and C.G.M.M. services, but by the Canada Steamship Lines, Ltd., the Cunard, Furness, Thomson, Head, Anchor-Donaldson and White Star-Dominion lines, the Manchester liners, etc., and to Vancouver, B.C., direct services are run by the Furness line, the Harrison and Blue Funnel lines, and by the Holland-America line in conjunction with the Royal Mail Steam Packet Company. Ports on the Continent are served by some of the above-named lines, and in addition by the Compagnie Canadienne Transatlantique, the Marine Navigation Company of Canada, Ltd., the “Red Star” and “Canada” lines, and the Navigazione Generale Italiana.

South and West Africa are in communication with Canada by means of direct services maintained by the Elder-Dempster line. Australia and New Zealand are in touch with the Dominion from both Atlantic and Pacific ports, there being, in addition to the services maintained by the C.G.M.M. and the C.P.S., one from Eastern Canada run by the New Zealand Shipping Company. Regular communications have been maintained for many years between Eastern Canada and the British West Indies, British Guiana, Cuba, etc., under the auspices of the Royal Mail Steam Packet Company, and the recent Canada-West Indies agreement provides for the establishment within the next

few years of weekly and fortnightly services connecting Canada with the Eastern and Western Caribbean ports, services being provided by the C.G.M.M. and C.P.S. Ltd.

Between Canada and British India and the East Indies services are run by the Ellerman-Bucknall and the Houston lines in addition to the C.G.M.M., the latter being run in conjunction with the British India Steam Navigation Company. This route, by connecting with the service run from Vancouver westwards, accomplishes the girdling of the world by the freight-carrying services controlled by the Dominion Government.

Far Eastern ports are reached from Vancouver, B.C., by the C.P.S. vessels, and by those of the C.G.M.M. in conjunction with the Blue Funnel line, as well as by the steamers of the Robert Dollar line; and to Mexico and the western side of South America steamers run from Vancouver under the auspices of the C.G.M.M. To the eastern side of South America freight steamers are run by the C.G.M.M. and by the Houston line.

These steamship services, run many of them in very close combination with the two great railway systems and in harmony with privately owned transportation concerns in all parts of the world, provide excellent opportunities for both export and import trade, saving charges inseparable from transit trade *viâ* American and other intermediaries and affording an advertisement abroad of Canadian products the precise money value of which can, of course, never be accurately estimated. In 1916 Canada was only thirteenth among maritime nations. Since then she has risen to the eighth place, with nearly 9,000 vessels of 1,583,000 tons.

Canada, therefore, with its population after the world war of 8,714,103 persons, is in many respects a very different market from that with which British firms were familiar prior to 1914, and the seven years of struggle have brought to light many possibilities inherent in its people which might otherwise have manifested themselves much more slowly, though,

perhaps, in an equally sure manner in the long run. From the psychological standpoint there is hardly any doubt that the association in battle of so many of the bravest sons of both countries has led to a higher appreciation by Canadians of their fellow-citizens in the United Kingdom, and the presence in England of nearly 500,000 Canadian nurses and fighting men has familiarised them with many aspects of British life formerly unknown to them. Moreover, during their presence in this country they have developed some acquaintance with British-made goods, they have read English advertisements and have used many of the products of British firms with which they were not previously familiar. Furthermore, many of our Canadian fighters have taken back with them to share the ups and downs of life on prairie farm, or in easier walks of life in city or town, numbers of the brave young women of England and Scotland, whose contribution to the victory of the Allies was no less in its particular sphere than that of their brothers who endured the storm and stress of strife on the battlefield. The many English girls who now reign as queens in homes from the Atlantic to the Pacific, controlling the commissariat department of numerous Canadian ex-soldiers and maintaining throughout their lives in the new country of their adoption a love of the old homeland across the seas, will be an important influence during the coming years in connection with the sales in the Dominion of the better-advertised products of the United Kingdom, and the revival of immigration since the war on a large scale is another influence which must always be borne in mind in view of the fact that these newly arrived prospective Canadian citizens will reinforce a strong body of British-born people whose sympathies will never fail to bring about a preference for the British article, even when American or Canadian products of equal quality are obtainable at the same price.

There is at the present time throughout Canada an

unusually keen desire to develop business connections with the United Kingdom both in import and export trade, and there has, perhaps, never been a time when more influences in the direction of encouraging British trade in Canada were operative. Since the conclusion of the Armistice there has been a general restocking of shelves made bare during the comparative isolation of Canada from Europe, and while the importation of American products has continued on a large and increasing scale, the purchases of British goods have been developed in a much greater proportion. The disposition in Canada is still further to replace American goods by those produced either in the Dominion or in the Mother Country. The tariff preference is maintained, and the depreciation in Canada of sterling currency operates as an additional preferential margin to which full benefit is given by the Customs authorities in valuing for duty goods from the United Kingdom. The depreciation in the value of the British sovereign in Canada is comparatively small during the summer months, when the balance of trade is predominantly westward, but with the coming of the Fall eastward shipments of grain, dairy products, live stock, etc., are resumed, and the exchange rates (unless affected by stabilisation schemes) necessarily respond to the increased purchases of Canadian products by British importers. A further depreciation in sterling currency would normally result, leading to an increase in the advantage conferred upon the exporter to Canada of British-manufactured goods in competition with United States manufacturers.

British firms studying the Canadian market should also remark carefully the disadvantageous situation, so far as exchange rates are concerned, which faces their American competitors. Since the conclusion of the Armistice, as already indicated, there has been a heavy importation into Canada of American as well as British goods, and these imports have far exceeded the exports which are necessary in order to maintain an even

balance. The result of this excessive importation of American-manufactured goods has therefore been a depreciation of Canadian currency in the United States amounting throughout the spring and summer of 1921 to from 12 to 15 per cent. The obvious result of this depreciation has been continual discontent on the part of wholesalers in Canada at the difficulties and annoyances incidental to trading with American manufacturers, and for this reason alone—coupled with the intensely British feeling of the Canadian people since the war, together with a tendency, perhaps, to criticise somewhat harshly the war record of the neighbouring republic—Canadian wholesalers would willingly replace British goods for American if they could be obtained on satisfactory terms as regards quality, price, etc.

The exchange situation between the two neighbouring North American countries after the Armistice resulted in a heavy export to the United States of Canadian grain, live stock, dairy produce, etc., which, in view of the cessation of British Government purchases at the end of 1920, found a profitable market in the south on account of the disparity between the Canadian and the American dollar. The heavy importations into the United States of Canadian products during the winter of 1920-1921 seriously alarmed the American agriculturists, whose influence at Washington was strong enough to secure the passage into law of an Emergency Tariff levying high duties upon natural products of Canada, the trade in which has been recently worth some \$160,000,000 annually. The result of the barring out from the American market of these products necessarily places the Canadian producer in the position of finding export markets elsewhere, and much of the trade formerly carried on to the south must be diverted to Great Britain as Canada's principal customer for agricultural and other natural products. The Fordney Bill for a Permanent Tariff proposed increases of duties on approximately \$225,000,000 worth of Canada's annual exports to

the United States. Of this amount agricultural products affected amount to some \$174,000,000. Lumber exports directly affected amount to about \$12,000,000, fisheries to the extent of \$14,000,000; while miscellaneous items, including numerous manufactured products, make up the balance of exports which, if hindered in their outlet south of the boundary line, must be sold at home or in overseas markets, leaving a hiatus in the balance of trade between the two North American countries which must inevitably react upon the Canada-U.S.A. exchange rates and effect the exclusion from the Canadian market of much of the trade in American-manufactured goods now a prominent feature there. Even should the Fordney Bill be withdrawn, the disposition of Canadian business men to substitute British goods for American must react strongly to the advantage of manufacturers in the United Kingdom who can see and seize their chance in time, and this disadvantage under which their American competitors will labour is to be further enhanced by the recent decision of the Canadian Customs authorities to value for duty goods from the United States at the face value of the dollar across the border plus the margin of depreciation in the exchange on the date of shipment, thus adding appreciably to the amount of money payable thereon in duties.

The various circumstances cited above should therefore lead British firms to revise any previous impressions they may have formed as to the difficulty of securing business in the Canadian market, and to give diligent study to the possibility of building up connections in a country devoted to British institutions, having a population mainly of British descent and largely of British birth, whose earnest desire is to purchase from the United Kingdom goods which cannot be procured to the same advantage from Canadian sources, and whose buying power is probably unsurpassed by any other nation of 9,000,000 people in any part of the world.

CHAPTER II

CANADA'S VAST NATURAL RESOURCES

As has already been indicated, the value of the Canadian market to the British manufacturer lies very largely in the fact that the Dominion is a country of vast area, possessing natural resources of almost every description, making her a permanent storehouse of food and raw materials for the industrial centres of the world and rendering her population a body of steady purchasers of manufactured goods of domestic or overseas origin. The market offered by the Dominion to British firms is an important one at the present time, but with the further increase in her population, now 8,714,103 ; with the settlement of still more of her vast acreage of arable lands ; and with the further development of her mineral, forest and other resources ; that market for the products of highly skilled workers like those of the United Kingdom must continue to grow provided that the Mother Country maintains its standard of manufacture, and continues to excel in as many fields of production as she does to-day. Canada produces annually marketable commodities of all kinds amounting in value to something like \$5,000,000,000, calculated as shown on p. 13, as against analogous figures ten years previously.

The second total represents an annual production, after allowance has been made for the depreciation in money values, greater in value than that of 1910 by at least 90 per cent., and during the same period the annual value of Canada's exports has risen from \$279,000,000 to \$1,239,000,000, or, on the same basis, 180 per cent.

Canadian Production Statistics.

	1910. \$	1920. \$
Field crops . . .	385,000,000	1,460,000,000
Orchard and garden crops . . .	32,000,000	40,000,000
Live stock . . .	414,000,000	1,337,000,000
Animal products . . .	90,000,000	165,000,000
Fishery products . . .	30,000,000	61,000,000
Forest products (raw)	171,000,000	145,000,000
Mineral products (raw)	122,000,000	210,000,000
Manufactures (value of products minus cost of materials) .	564,000,000	1,300,000,000
	<u>\$1,808,000,000</u>	<u>\$4,718,000,000</u>

So far as Canada's AGRICULTURAL RESOURCES alone are concerned, it is a remarkable fact that there are in the Dominion, exclusive altogether of the North-West Territories and the Yukon, over 300,000,000 acres of land suitable for agricultural operations, and probably a very much greater area which could be used for the pasturage of domestic animals. Out of this area only from 50,000,000 to 60,000,000 acres are at present under crop, and the estimated wealth of the rural population in land, buildings, implements, live stock, etc., together with the annual production of foodstuffs in 1920, is reckoned at \$7,612,151,000, exclusive of many miscellaneous products, such as tobacco, flax fibre and maple products, which would add another \$23,000,000 to this total. Agricultural production for the year 1920 is estimated at \$1,946,648,000, made up of:—

	\$
Field crops . . .	1,455,244,000
Farm animals . . .	140,083,000
Wool . . .	5,321,000
Dairy products . . .	256,000,000
Fruit and vegetables . . .	40,000,000
Poultry and eggs . . .	50,000,000

and these, with \$4,232,588,000 in respect of land and buildings, \$391,669,000 for farm implements, and \$1,041,246,000 for farm live stock, make up the large total of nearly \$8,000,000,000 quoted above.

The many varieties of climate to be found in a vast country stretching from the Atlantic to the Pacific, and from the latitude of the Mediterranean to the North Polar Circle, obviously afford possibilities for the cultivation of a large variety of farm and garden products of the types usual in the temperate zone, and these range from the grain crops usual in Great Britain to such plants as tea, olives, figs, filberts, almonds, etc., which are grown, albeit on a small scale at present, in the sunny gardens of Vancouver Island, on the Pacific coast. The "money crop" *par excellence* in Canada is, however, WHEAT, of which grain the Dominion produces about 12 per cent. of the world supply; and the steady but rapid growth of this cereal in the Dominion has meant much to the material prosperity of the Canadian people, particularly those of the vast prairies in the West. Canada now stands second among the world's wheat-producing countries. The 1920 wheat crop of 263,189,300 bushels represented when sold the sum of \$427,357,000, the great bulk of which was earned by the farmers of Western Canada, which, in spite of the gradual development in its cities and towns of manufacturing industries, is still a predominantly agricultural region, and destined to remain so for many years to come. Wheat represents to Canada the main export crop, and much of the buying power of the West in particular is dependent on the results of the harvest of this grain, which has its value also to the dairying industries in view of the production by flour mills of bran and shorts and middlings, which are so indispensable for the raising of live stock.

Second in importance among Canada's grain crops is OATS, the 1920 production of which reached 530,709,700 bushels, worth to the farmers some \$280,115,400; and this cereal is followed by hay, potatoes and barley as

money-making crops for the Canadian farmer. There is in Canada a steady increase in the per acre production of grain, due to the work of the Dominion Experimental Farms, the Agricultural Colleges and the Seed-growers' Associations, and many new varieties of wheat have been produced in Canada during the past few years, the cropping powers of which are remarkable.

Field experiments with several varieties of wheat in Northern Alberta in 1920 gave the following results :—

		Days to mature.		Yield. bus.	lb.
Kitchener	.	115	..	54	13
Red Bobs	.	112	..	54	00
Huron	.	115	..	50	10
Early Red Fife	.	115	..	48	29
Marquis	.	114	..	46	21
Ruby	.	98	..	39	49

There are 3,000 farmer members of the Canadian Seed-growers' Association who are producing improved seeds for registration. A large proportion of the farmers of Canada are now using seed grain traceable to strains which have been multiplied by farmers who are, or have been, members of the Association. The increase in the crop by improved seed runs from 2 to 5 bushels an acre, according to the season and the general management of the farm.

At present, however, the average yield per acre over the enormous area under crop is still much less than that for thickly settled and highly developed countries like England and Denmark. Grain production in Canada includes not only the crops to which reference has already been made, but also rye, buckwheat and Indian corn; and an important crop, particularly in Ontario and in the prairie provinces, is flax seed, peas and beans being also cultivated in large quantities.

The total area estimated as sown to wheat in Canada for the harvest of 1921 is 23,261,224 acres. The latest estimates of the 1921 field crops available at the time of going to press are as follows, and it is

anticipated that the prices secured will almost equal in the matter of buying power those of 1920, particularly in view of the lessened cost of labour incurred in raising and harvesting them, and by reason of reduced costs of goods to be purchased by the farmers.

	Bushels.
Wheat . . .	329,835,300
Oats . . .	510,093,000
Barley . . .	64,252,800
Rye . . .	25,800,400
Flax seed . . .	4,364,500

Among the field crops of Canada is also FLAX FIBRE, which is now grown on a large scale, and very successfully from the point of view of quality, in Ontario and Quebec. The recent discovery of a satisfactory flax-pulling machine is of great moment to Canadian agriculture in view of the lack of cheap labour such as is available in flax-producing countries like Ireland, Belgium and Russia. The area sown to flax for fibre in 1920 was 31,000 acres, all in Ontario, as compared with 20,262 acres sown in Ontario in 1919. The yield of flax fibre was 3,620 tons, the average rate per acre being 240 lb. Flax tow yielded 1,860 tons, or 270 lb. per acre, and there were also 217,000 bushels of fibre-flax seed, the average yield per acre being 7 bushels. The production of fibre flax portends important developments in the Canadian linen industry, as the Canadian market is able to absorb about ten times as much linen as is produced locally. Approximately \$1,000,000 worth of flax seed was exported from Canada to Ireland during 1920.

HEMP is grown in Western Canada, and the FRUIT production of Canada includes practically every kind familiar to dwellers in the temperate zone, the predominant crop for export trade being apples from Nova Scotia, Ontario and British Columbia. SUGAR BEETS are also grown, mainly in the province of Ontario, and the results for 1920 constitute a record as regards area,

yield, crop values and sugar production, these returns averaging nearly double those of 1919. The value of the beet sugar produced was \$12,856,424, and the steady development of the industry will be judged from the following table :—

Area, Yield and Value of Sugar Beets in Canada and Production of Refined Beetroot Sugar, 1911-1920.

Year.	Acres grown.	Yield per acre.	Total yield.	Average price per ton.	Total value.	Production of refined beetroot sugar.
	Acres.	Tons.	Tons.	\$ c.	\$	Lb.
1911	20,677	8.50	175,000	6 59	1,154,000	21,329,689
1912	18,900	10.50	201,000	5 00	1,005,000	26,767,287
1913	17,000	8.75	148,000	6 12	906,000	26,149,216
1914	12,100	9.00	108,600	6 00	651,000	31,314,763
1915	18,000	7.75	141,000	5 50	775,500	39,515,802
1916	15,000	4.75	71,000	6 20	440,000	17,024,377
1917	14,000	8.40	117,600	6 75	793,800	23,376,850
1918	18,000	11.25	204,000	12 71	2,593,715	50,092,835
1919	18,800	9.50	180,000	14 61	2,630,027	37,839,271
1920	34,491	9.94	343,000	15 47	5,307,243	89,280,719

TOBACCO-GROWING in Canada has made remarkable progress during the last few years, and of "White Burley," a staple tobacco used for all purposes, the production during 1920 in Ontario alone was 20,000,000 lb., as against only 4,000,000 lb. in 1916, some 20,000 acres having been planted with tobacco in the Province named, which also produces some 2,000,000 lb. of "Virginia" leaf annually. There is also a very considerable production of leaf tobacco in both Quebec (12,000,000 lb. for cigars) and British Columbia.

Among the smaller side-lines open to the Canadian farmer are BEE-KEEPING and the manufacture of MAPLE SUGAR, both of which occupations are profitable to the producer. During the last few years there has

been a substantial expansion in the maple sugar industry. This is particularly true as far as Quebec is concerned, the 1920 output of sugar in that Province being about 30,000,000 lb. as compared with 11,000,000 lb. in 1911. The output in Ontario was about 7,000,000 lb. compared with an average in previous years rarely exceeding 5,000,000 lb., and in Nova Scotia and New Brunswick, the only other Provinces producing the commodity, about 500,000 lb. There has been a large increase in the export of maple sugar during the last five years, the total for the fiscal year 1919-1920 being 4,005,124 lb. against 1,462,416 lb. in 1914-1915.

LIVE STOCK RAISING is one of the oldest of the industries of Canada, although the old time ranchmen are no longer responsible for more than a minor part of the production of cattle in the Dominion, and ranching is likely before long to be associated rather with the reindeer, caribou and musk ox of the Far North than with the domestic ox or sheep. Great efforts are made by the various Dominion and Provincial authorities, as well as by the railways, to encourage mixed farming by Canadian agriculturists, and in most of the Provinces provision is made for the improvement of herds by the loan of pure-bred sires of horses, cattle, sheep and hogs. The estimated number of live stock in Canada in 1921 was as follows :—

Horses	.	.	.	3,813,921
Milch cows	.	.	.	3,736,832
Other cattle	.	.	.	6,469,373
Sheep	.	.	.	3,675,860
Swine	.	.	.	3,904,895

and poultry numbered in all some 37,182,117 head. The value of these herds was considerably in excess of \$1,000,000,000.* The active propaganda recently carried on for the removal of the embargo on Canadian cattle in Great Britain has this in its favour, that an open market in the United Kingdom for lean cattle would

* Canada exported 515,000 head of cattle in 1920.

provide a valuable alternative market to the United States for store animals, but against it that the interests of the Dominion might perhaps be better served by exporting fat cattle from Canadian farms for slaughter at the ports, or by shipping beef in refrigerator vessels, if these could be obtained, thus retaining for use in Canada the large quantities of offals, hides and other products which would otherwise be lost to Canadian industries and have to be imported. The meat industry of Canada is a very important one, having a total capitalisation in 1919 of \$93,363,791, invested in eighty-two plants, and employing some 13,222 persons in that year on a total production of fresh or cured beef, canned goods and by-products worth \$233,936,913, these by-products, including 581,012 hides of various kinds and much fertiliser material, being of great value for various purposes, and utilised to the fullest extent by the great packing concerns by whom the industry is carried on. A consignment of Canadian chilled beef reached London in August, 1921, and was sold within an hour of its arrival. The quality was pleasing, and it is stated by the trade that there is an opportunity for this business between Canada and Great Britain.

The establishment of the DAIRYING industry in Canada has been of great value to agriculture as a whole, and it is being energetically developed in the West, which was originally dependent almost entirely for its prosperity upon the fortunes of the wheat crop. There are many fine herds of pure-bred dairy cows in all parts of Canada, and the number of milch cows increased in 1920, when, for special reasons, other totals were declining. The industry is predominantly in the efficient hands of co-operative organisations, and there are in every Canadian Province cheese factories and creameries, the 1920 totals reaching 1,674 for cheese factories, 1,053 for creameries and 410 for combined factories. The cheese factories have become very popular with the farmers, particularly in Ontario and

Quebec, as the factory plan relieves the farmer's household of much heavy labour and permits of a much larger number of cows being kept on the average farm. A skilled cheese or butter maker, as the case may be, is employed, and the result is greater uniformity in quality and packing and, speaking generally, a very much higher standard of quality. Important advantages are also gained in the marketing of the product. The manufacture of butter is not so generally monopolised by the creameries as is the making of cheese by the factories. The condensed milk industry received a considerable impetus during the war, and by the end of 1920 there were twenty-eight condenseries. The manufacture of milk powder has also expanded greatly of recent years, largely owing to the development of chocolate manufacture in the Dominion. The quantity of creamery butter made in 1920 was 110,030,399 lb., valued at \$62,306,794 ; cheese manufacture aggregated 149,521,008 lb., worth \$39,087,937 (Canada now ranks fourth in the world's production of cheese) ; condensed milk, 53,980,993 lb., valued at \$10,217,803 ; evaporated milk, 30,469,642 lb., worth \$3,809,653 ; and milk powder, 7,574,668 lb., the value of which was \$2,178,176. The total value of factory-made dairy produce in Canada in 1920 was \$144,483,188, an increase of \$9,000,000 over the 1919 total, but probably only about one-half of the total output, including that made by farmers on their own premises. The important development of dairying in the Prairie Provinces in recent years should not be overlooked, and Edmonton is stated to be the greatest butter-making centre at the present time in Canada. The capital invested in Canadian dairy factories in 1920 amounted to \$32,767,317 ; the number of employees was 11,211, and the amount paid in salaries and wages reached \$8,776,676. Dairy products form an important item in Canadian export trade, and therefore in the buying power of the Dominion for imported goods, exports of butter, cheese, milk and cream in 1920

having been worth \$58,344,922, the bulk of the trade in butter and cheese being with the United Kingdom.

The Dominion of Canada is, for climatic reasons, obviously one of the heaviest WOOL-consuming countries in the world in proportion to its population, and the production and improved preparation of raw wool is a matter which is receiving much attention. Canada has until recently produced barely one-third of the wool needed annually by its manufacturing industries, and much of what was produced was unsuitable for use owing to lack of experience in grading, being exported to the United States for preparation there. At the present time, however, Canada produces approximately 22,500,000 lb. of wool out of some 54,000,000 lb. of scoured wool required for clothing its population of 8,714,103, and the Dominion undoubtedly offers room for the expansion of the sheep industry to almost any limit conceivable. Unimproved land for the most part is cheap, and no animal can make it more profitable than sheep. Under the guidance of the Live Stock Branch of the Dominion Department of Agriculture, the farmers have in post-war years made remarkable progress, and wool is being produced which is the equal of any similar classes and grades in the world. Canadian wools are now classified into eleven main grades and many sub-grades, including combing and clothing lengths. Much of the wool produced is now marketed by the Canadian Co-operative Wool-growers, Ltd., whose efforts have been so successful that the industry looks forward before long to the use by Canadian manufacturers of the entire wool clip of the Dominion. The first shipment of graded wool from Canada, some 130,000 lb., reached Bradford in 1920, and met with such favourable comment that the wool-growers are now to be represented in that city, where they hope to market much of the wool barred out of the United States by the new American tariffs on Canadian natural products. During the year 1920 the Canadian Co-operative Wool-growers, Ltd., sold for their members

5,146,437 lb. of wool. Alberta led the Provinces with 2,157,733 lb., Saskatchewan was second with 865,175 lb., and Manitoba fourth with 370,872 lb.

Canada's FORESTS are one of her greatest assets, and they have, on the whole, been much less wastefully exploited than is the case in the United States. The Dominion is third on the list of the world's lumber-producing countries, and apart altogether from its output of timber, supplies 32 per cent. of the world's production of pulpwood. According to the latest available estimates, the Dominion has between 500,000,000 and 600,000,000 acres of forest land, out of which between 200,000,000 and 300,000,000 acres are covered with timber of merchantable size, including 30,000,000 acres in British Columbia, 100,000,000 acres in Quebec, 70,000,000 acres in Ontario, 11,000,000 acres in what are popularly called the "Prairie Provinces" of Western Canada, 9,000,000 acres in New Brunswick, and 5,000,000 acres in Nova Scotia. It is estimated by the Commission of Conservation that in the whole Dominion of Canada there are 1,065,000,000,000 board measurement feet of standing timber. Of this 360,000,000,000 feet are located in British Columbia and 200,000,000,000 feet in the Prairie Provinces. In the Province of Ontario the timber most largely cut into lumber is white pine, with hemlock, red pine, spruce and maple following in order of quantities; in Quebec spruce leads, as it does in every Province except Ontario and British Columbia, being the main ingredient of wood pulp and paper, and it is followed by white pine, hemlock, birch and balsam fir; while in the Maritime Provinces spruce ranks first, with hemlock, white pine, balsam fir and birch following; in Manitoba, Saskatchewan and Alberta spruce is followed by tamarack and jack pine; but in British Columbia the cut of the stately Douglas fir exceeds that of all other woods combined. Tamarack, cedar, spruce, yellow pine, hemlock, white pine and balsam fir follow in order of quantities cut. The largest saw-mills in Canada are located in

British Columbia, and just prior to the war were cutting more Douglas fir lumber than Canada produced of any other one species. Douglas fir lumber is one of the hardest, heaviest, stiffest and strongest to be found in Canada, and is most important in the building trades, being used also by railway companies for sleepers, car-building and bridge construction, as well as in the wooden ship industry which became so important in British Columbia during the closing months of the war. White spruce probably forms the greatest part of the spruce cut in Canada, as this tree is abundant in every Province except British Columbia, which, however, produces the famous Sitka spruce on the Pacific coast and the Engelmann spruce in the Rocky Mountain districts. Red spruce is the most important species in the Maritime Provinces and South-Eastern Quebec. White pine is cut from one species only in Eastern Canada, growing throughout the Maritime Provinces and in Ontario and Quebec south of the height of land between the St. Lawrence and Hudson's Bay. Red pine or Norway pine, sometimes confused with white pine in the trade, is a similar wood, but is usually harder and stronger and contains more resin. It has the same distribution as white pine, but is often found farther north. Eastern hemlock is found almost wherever white pine thrives, though not quite so far north or west, but the western species is a much more valuable wood, being used for all but the heaviest construction purposes. The cut of birch is made up of wood of some seven species, of which yellow birch is the most valuable. There are six or eight species of maple trees in the Dominion, sugar maple being the most important as to quantity and quality of lumber produced.

The Canadian LUMBER INDUSTRY is one of the oldest in the Dominion, and has always been one of the most important. Capitalist organisation of the industry dates from the beginning of the nineteenth century, the chief centre being originally at Quebec, from which the

centre of gravity gradually shifted to the Ottawa Valley. From the beginning of the present century there has been developing not only a great export demand for Canadian lumber, but also an enormous domestic demand, and the phenomenal growth within the past few years of the pulp and paper industry has also contributed in no mean degree to an increased demand for Canadian forest products. According to a preliminary report recently issued in regard to the year 1919, there were then some 3,410 plants in operation, the total capitalisation of which was \$231,203,247, and the number of employees 73,480, the earnings of these people amounting in that year to \$60,999,020. The aggregate value of products turned out during 1919 was \$222,648,790, British Columbia, Ontario and Quebec being almost equal with totals of about \$60,000,000, followed by New Brunswick with \$26,713,403. The production of sawn lumber alone for each species of wood is shown in the table on p. 25, other products including shingles and lath, pulp-wood for paper manufacture, etc. A great deal of work is being done both by the Dominion and Provincial authorities and by private corporations in the direction of forest conservation, and one company is planting trees at the rate of 2,000,000 per annum. Aircraft are being pressed into service in connection with fire protection, and, in short, a general stock-taking of the forestry situation is going on in the Dominion, as well as in the United States, in view of the enormously increased demand upon Canadian resources which has resulted within a very short time as a consequence of the depletion of supplies in the republic to the south. The forest wealth of Canada is likely to assume additional importance to the world during the next few years by reason of the growing developments in the Canadian chemical industry and the continual demand for the more efficient utilisation of BY-PRODUCTS. The wood distillation industries of Canada underwent considerable development during the war, and the demand for a substitute for petrol is certain to give a

Canadian Production of Sawn Lumber, 1919.

	Quantity, 1,000 feet board measure.	Selling value at the mill. \$
Softwoods :—		
Spruce	1,335,044	43,941,766
Douglas fir	817,844	22,407,922
White pine	479,937	19,872,271
Hemlock	234,785	6,899,719
Balsam fir	140,834	4,310,152
Cedar	98,808	3,148,810
Red pine	89,198	3,404,029
Jack pine	45,016	1,359,245
Western yellow (Bull pine)	37,776	1,081,287
Tamarack	16,490	438,333
Larch	15,763	400,995
Other kinds	14,893	435,217
Custom-sawn lumber .	308,377	7,468,937
Hardwoods :—		
Birch	69,077	2,671,508
Maple	44,755	1,626,368
Basswood	25,247	945,002
Elm	15,709	564,690
Poplar	13,584	435,165
Beech	10,581	338,236
Ash	7,035	245,162
Cherry	3,714	123,802
Oak	2,829	133,591
Chestnut	901	25,848
Butternut	374	13,592
All others	2,260	68,101
Total, all woods . . .	3,830,831	\$122,359,748

great impetus to the present efforts to find a source of industrial alcohol in the waste sulphite liquor produced by the pulp and paper industries. The gradual transformation of Canadian pulp manufacture from the sulphite and sulphate processes to the soda process

will give rise in its turn to many developments in by-product conservation which may be of great importance before many years.

The developments in the Canadian PULP AND PAPER industries during the past few years, and particularly since the Armistice, are no doubt broadly familiar to British business men. According to the census of the industry for 1919, the total capitalisation of this branch of manufacture was then \$264,581,300, the shares being widely distributed among more than 25,000 persons. The industry comprised ninety-nine plants, of which thirty-three made paper only, thirty-nine pulp only, and twenty-seven both pulp and paper. The great bulk of this investment is of Canadian capital, though a considerable proportion is derived from the United States, and there has recently been a further influx into the industry of British capital as the result of visits to the Dominion of newspaper men from the United Kingdom. The workers in the mills numbered in 1919 some 25,191, drawing in wages and salaries \$32,323,789, and producing pulp worth \$48,562,088 and paper worth \$91,362,913. In 1914 the total quantity of pulp manufactured was 934,700 tons. Four years later the production was 1,557,193 tons, and during 1920 it probably reached 2,000,000 tons. Canadian pulp and paper is sold not only in the United States, to which country, however, over 80 per cent. of the production is exported, but in practically every paper-importing country in the world, and the growth in the industry during the year 1920 will be gauged by the fact that exports of wood pulp during the twelve months reached 16,399,697 cwts., valued at \$76,383,978, newsprint paper shipments alone reaching 15,238,891 cwt., worth \$72,920,225, and other descriptions of paper totalling \$13,823,785 in value. Canadian exports of forest products of every description during the fiscal year ended March 31st, 1921, were worth \$284,561,478, as compared with \$118,466,621 in 1917-1918, an enormous increase in so short a period.

The MINERAL DEPOSITS of Canada, the development of which began comparatively recently as compared with the exploitation of furs and fisheries, timber and agriculture, are extremely varied in character and distributed widely over the vast area of the Dominion, and great progress has been made since the search for mines was commenced on a considerable scale nearly forty years ago. Comparatively little is known even now about the conditions in the great and almost wholly unexplored North-West Territories, where there appears, however, likely to develop not only a gold, copper, nickel and cobalt field of great promise, but also one of the world's greatest oil-bearing districts, the important oil strike made in 1920 in the neighbourhood of Fort Norman, in the Mackenzie district, being regarded as but the preliminary of many others to be recorded within the next few years as prospecting proceeds. Passing from probabilities to known developments in the Dominion, we find that gold, silver, copper, lead, zinc and gypsum are produced in commercial quantities, while, with the exception of a deposit in New Caledonia, Canada has a virtual monopoly in the production of nickel, and produces between 80 and 85 per cent. of the world's entire output of asbestos, as well as 90 per cent. of its cobalt. Among the Provinces of Canada, Ontario leads with a production worth in 1920 some \$78,749,178 out of the total Dominion output, valued at \$217,775,080. British Columbia followed with a total mineral production during the year valued at \$38,044,915, and the figure for Alberta was \$33,721,898 (mainly coal); Nova Scotia, \$30,187,533; Quebec, \$27,722,502; Manitoba, \$3,900,207; New Brunswick, \$2,225,261; Saskatchewan, \$1,711,580; and the Yukon Territory, \$1,512,006. The following table, showing the Canadian mineral output during 1920, will indicate the immense variety of minerals already produced in the Dominion, but can give no adequate impression of the vast, unexploited resources of Canada awaiting development:—

Canadian Mineral Production, 1920.

	Quantity.	Value.
METALLIC.		\$
Cobalt, metallic and contained in oxide, etc., at \$2.50 per lb. . . . Lbs.	593,920	1,484,800
Copper, value at 17.456 cents per lb. . . . "	81,155,360	14,166,479
Gold, at \$20.671834 . . Oz.	766,912	15,853,478
Iron, pig, from Canadian ore Tons*	75,869	2,066,997
Iron ore, sold for export "	7,855	58,476
Lead, value at 8.940 cents per lb. . . . Lbs.	33,985,974	3,038,346
Nickel, value at 40 cents per lb. "	61,136,493	24,454,597
Platinum from alluvial sands Oz.	17	704
Platinum, palladium, etc., from Sudbury matte "	1,922	122,661
Silver, value at 100.90 cents per oz. "	12,793,541	12,908,683
Zinc, value at 7.671 cents per lb. Lbs.	40,166,200	3,081,149
Total	—	\$77,236,370
NON-METALLIC.		
Actinolite Tons	100	1,160
Arsenic, white and in ore "	2,408	313,575
Asbestos "	167,731	13,677,841
Asbestic "	20,956	57,601
Barytes, manganese and talc "	—	131,822

* Short tons throughout.

	Quantity.	Value.
		\$
Non-metallic— <i>continued.</i>	—	
Chromite . . . Tons	10,500	244,984
Coal . . . „	16,623,598	77,326,853
Corundum . . . „	*	
Feldspar . . . „	36,856	274,075
Fluorspar . . . „	11,229	260,446
Graphite . . . „	2,227	173,537
Grindstones. . . „	2,319	78,136
Gypsum . . . „	429,144	1,876,595
Magnesite . . . „	18,378	512,756
Magnesium sulphate . „	1,855	30,648
Mica . . . „	2,150	368,297
Mineral water . . .	—	24,109
Natural gas . . M. cu. ft.	16,961,284	4,225,887
Oxides . . . Tons	18,768	144,409
Peat . . . „	3,900	15,600
Petroleum, crude . Brls.	196,937	821,545
Pyrates . . . Tons	174,744	751,009
Quartz . . . „	127,995	466,621
Salt . . . „	210,211	1,547,879
Sodium sulphate . . „	813	19,877
Tripolite . . . „	260	8,600
Total . . .	—	\$102,353,862
STRUCTURAL MATERIALS AND CLAY PRODUCTS.		
Cement, Portland, Puz- zolan . . . Brls.	6,651,980	14,798,070
Clay products (\$10,533,271)—		
Brick, common. . M.	315,110	4,868,958

* Railway shipments 195 tons.

	Quantity.	Value.
Clay Products— <i>continued</i> .		\$
Brick, pressed . . . M.	81,776	1,756,760
Fireproofing . . . Tons	49,220	591,216
Hollow building blocks M.	—	284,163
Kaolin . . . Tons	683	15,022
Moulded and orna- mental, terra cotta .	—	120,875
Pottery	—	207,410
Refractories, fire-clay, etc. . . .	—	517,335
Sewerpipe . . . Tons	58,827	1,549,090
Tile, drain . . . M.	16,061	619,442
Lime . . . Bus.	9,355,797	3,748,463
Sand-lime brick . . . M.	46,102	718,735
Sand and gravel (not complete). . . Tons	6,588,037	3,208,660
Slate . . . Sq.	—	14,200
Stone (\$5,163,449)—		
Granite	—	1,389,976
Limestone	—	3,404,906
Marble	—	240,353
Sandstone *	—	128,214
Total structural materials and clay products . .	—	38,184,848
All other non-metallic . .	—	102,353,862
Total value metallic . .	—	77,236,370
Grand total, 1920 .	—	\$217,775,080

The extent to which a country owes its position and prosperity among the industrial nations of the world to the possession of abundant and cheaply won COAL hardly needs any emphasis in the United Kingdom, and

* Additional returns of \$47,500.

it will therefore be a matter of interest to record that the Dominion of Canada is particularly well supplied with this still indispensable fuel. It is estimated that some 111,169 square miles of land in Canada are underlain with coal, representing 14 per cent. of the coal reserves of the world and 50 per cent. of those of the British Empire. The coalfields of Canada may conveniently be divided into the bituminous fields of Nova Scotia and New Brunswick (the first-named Province having some 10,690,000,000 tons of coal within its borders) ; the lignites of Manitoba and Saskatchewan ; the sub-bituminous and anthracite fields of Alberta and the Rocky Mountain region of British Columbia ; the semi-anthracite and bituminous fields of Vancouver Island, Queen Charlotte Islands and the interior of British Columbia ; the lignites of the Yukon Territory ; and the bituminous and lignite fields of the Arctic and of the Mackenzie basin. Saskatchewan has a known reserve of 2,412,000,000 tons and a possible reserve of nearly 60,000,000,000 tons, and the briquetting of these lignites into what approximates to anthracite fuel is likely to open up a valuable market in coming years as production begins to overtake the demand. The Province of Alberta, whose production of coal is now in excess of that of any other Canadian Province, has 81,878 square miles underlain with coal, ranging from semi-anthracite to lignite, all of which is easily won as compared with the older mines in the United Kingdom, being rather quarried than mined. The estimated available supplies appear fabulous expressed in figures, and for all practical purposes are inexhaustible. British Columbia is believed to possess 77,923,000,000 tons of bituminous coal, in addition to much lignite, and is likely during the next few years to develop a very considerable bunker trade on the Pacific Ocean. The vast unmined tonnage of coal in the Dominion, aggregating some 1,357,757,000,000 tons, compares with an estimated reserve of unmined coal in the United States of about 16,000,000,000 tons of anthracite and

3,538,000,000,000 tons of semi-anthracite and bituminous, sub-bituminous and lignite.

The Canadian coal mines reached a record production of coal in 1920 aggregating 16,000,000 short tons, but, in spite of this effort, it was necessary to import into the Dominion from the United States a quantity much larger than the domestic output. The coal deposits of the Dominion are located in the extreme eastern and western Provinces. The great industrial Provinces of Ontario and Quebec, though fortunate in their resources of hydro-electric energy, about which more will be said later, are without coal deposits, and need to transport large supplies from the nearest available source, *i.e.*, Pennsylvania. A great deal of attention is at present being given to this matter in Canada, in view of the general desire of industrialists and others to be independent of economic and other complications arising in the United States, but transport of Alberta coal into Ontario on a large scale is to some extent ruled out from reasons of cost as well as from the fact that crop movement is also in an eastward direction, and Nova Scotia supplies for Ontario would be delivered at a price considerably in excess of that charged by coal operators in Pennsylvania. The St. Lawrence trade in Nova Scotia coal has been resumed, and may in time develop for the Province of Quebec an important alternative source of supplies.

Mention should be made of the valuable work which has been performed in recent years in the direction of PEAT AND LIGNITE exploitation, particularly in Ontario so far as peat is concerned, fuel being marketed there at \$9 per ton, at which price it is economical from the point of view of the householder and likely to be much cheaper when the demand as well as the available manufacturing facilities develop. Saskatchewan lignite is being turned into an excellent and economical substitute for anthracite coal. The peat specialist of the Geological Survey informed the Special Parliamentary Committee on Canada's Fuel Resources that there was no reason why

Canadian peat should not replace all coal for heating purposes throughout the Dominion. This, he stated, would release coal importations for industrial purposes. Peat has proved satisfactory for cooking and open grates and for furnaces during the fall and spring months. So far more than 37,000 square miles of peat have been surveyed, and will no doubt be developed.

Canada possesses abundant resources in IRON ORES of various descriptions, these being situated for the most part in Northern and South-Eastern Ontario, New Brunswick, Nova Scotia and in British Columbia, but at the present time the development of these ores is prejudicially affected by the competition of higher grade iron ores imported from the southern shore of Lake Superior, and thus in American territory (the exhaustion of these Minnesota ores is already in sight), and from the British Dominion of Newfoundland, where at Bell Island, on the eastern shore, there are enormous deposits controlled by Canadian steel companies which have recently amalgamated as the British Empire Steel Corporation. Active mining operations are, however, at present being carried on in Canada mainly by the Algoma Steel Corporation at Moose Mountain, twenty miles north of Sudbury, at the Helen and Magpie mines, near Michipicoton, north-west of Sault Ste. Marie, and at the Atikokan range, west of Port Arthur, all of these in what is called "New Ontario," the Helen mine being at present the largest iron producer in the Dominion, consisting of hematite and limonite, three grades in all, this being smelted at Sault Ste Marie. Towards the end of 1920, after a great deal of investigation, a company was formed, under British auspices, which proposed to set up on the Pacific coast a plant for the production of iron and steel from the magnetite, hematite and limonite ores available in British Columbia, for which there is a good market not only on the Canadian and American Pacific coast, but also in the far Eastern markets reached by the vessels of the Canadian Government Merchant Marine, and readily served from the

port of Vancouver. The heavy importation into Canada of iron ores, pig iron and iron and steel manufactures, in recent years, combined with the exchange situation, has stimulated a great deal of interest in the problem of the utilisation of the low grade iron ores of Canada, particularly those of Northern and South-Eastern Ontario, and there seems to be every prospect that, with the introduction of the Moffatt and Stansfield methods of combined fuel and electric smelting, using the undoubted advantages of coal or oil fuel for the melting of the ore and leaving the higher temperature finishing processes to the electric furnace, it will prove economical to develop the ores found in such huge quantities in Hastings County and elsewhere in the Province of Ontario, lying in close proximity to water transport for coal supplies and to important hydro-electric powers. Ontario is known to have at least 500,000,000 tons of iron ore, although it is of a character which needs beneficiation before it can be smelted. The decreasing iron value or content of the Minnesota ores proportionately increases the value in the industry of Canadian ore, and promises before long to create another Canadian industry in which the transportation systems of the Dominion, and particularly, perhaps, the Canadian National Railways, will take an important part.

Canada's FISHERIES—lake, river and sea—are the most extensive in the world, and they are said to contain the best-known food fishes in greater profusion than those of other countries. Off the Atlantic shores, nearly 6,000 miles in extent, are the famous North Atlantic "banks," stretching from 50 to 100 miles from land, covering an area not less than 1,200 miles long and 300 miles wide, and abounding particularly in cod, haddock and halibut, whilst nearer shore, in the Gulf of St. Lawrence, the Bay of Chaleur, the Bay of Fundy and elsewhere, there is gathered a rich harvest of lobsters, herring, mackerel, salmon, smelt, shad and oysters. The inland waters of Canada, com-

prising the Great Lakes and the many giant rivers, contain numerous varieties of fish, including whitefishes, trout, pike perch, bass, pike, maskinonge, perch, catfishes, etc., and whale, walrus and other sea mammals are killed in Hudson's Bay.

The three Prairie Provinces of Western Canada produce more than \$2,000,000 worth of fish per annum. Of this substantial output whitefish, the typical lake fish of the North, accounts for the greatest aggregate in production and revenue, with 12,500,000 lb. added to the international food market. It is caught in Lakes Superior, Winnipeg, Athabasca, La Plonge, Lesser Slave and a host of smaller waters scattered over the northern area. This territory is literally dotted with inland waters and strung with a network of rivers. On many of these, commercial fishing concerns have been established, whilst others offer the same almost limitless possibilities, only awaiting railway and other transportation facilities to develop them.

On the Pacific coast, over 7,000 miles long, there is the world-famed salmon industry, and the halibut and herring fisheries are also very extensive in British Columbia.

The production of the fisheries of Canada during 1920 was officially valued at \$49,321,217, a decrease from the figures of the previous year of \$7,187,262. The chief items were :—Salmon, \$15,595,970 ; lobsters, \$7,152,455 ; cod, \$6,270,171 ; halibut, \$4,535,188 ; and herring, \$3,337,738. Of the total the British Columbia fisheries contributed \$22,329,161, and the Maritime Provinces \$18,881,067. During 1921 the catch was below normal both in volume and price.

Fish hatcheries operated by the Fisheries Branch, Department of Marine and Fisheries, Ottawa, distributed during 1920 three-quarters of a billion fry in the various Provinces throughout the Dominion. The largest distribution of any one species was the valuable whitefish, of which more than 400,000,000 were released. About half of these were distributed in the Great Lakes

and the balance in Manitoba. Pickerel came second to whitefish. Of this species 120,000,000 were distributed in the Great Lakes and 25,000,000 in Manitoba. Sockeye salmon, the most valuable of all the Pacific species, came third with 9,000,000.

Further, in the list of Canada's natural resources we have the FUR trade, which has been an important part of Canadian industry since the earliest years of the French *régime*. Until recently the operations of the trade were in the main confined to the trapping of the fur-bearing animals and the exportation of the furs in an undressed state to London or to the United States either for sale in their undressed condition or consigned to dealers in those places. An important change in the disposal of Canadian furs has come about since the close of the war, and a much larger percentage of pelts is now marketed in the Dominion and dressed and manufactured there. The success of an initial experiment a few months after the Armistice in the marketing of Canadian furs at Montreal was such that auction sales of furs are now held about three times a year there, and the city is fast becoming one of the world's principal centres of the fur trade. An indication of the development of Western Canada is the announcement of the formation in February, 1921, of the Winnipeg Fur Auction Sales Company. This company is stated to be backed by a number of prominent Winnipeg business men, and its object is to make Winnipeg a recognised raw fur centre and to retain there a trade worth up to recently some \$3,000,000 to \$4,000,000 annually. The total value of the pelts of fur-bearing animals taken in Canada during the season of 1919-1920 was \$21,197,372, the principal furs in order of value being musk-rat (\$5,966,762), beaver (\$5,336,067), marten (\$1,787,940), and mink (\$1,697,561), followed by silver fox, fisher, coyote, white fox, red fox, ermine, skunk, otter, lynx, patch fox, raccoon, timber wolf and black bear. It is, however, important to note that Canada is no longer depending for its supply of skins

upon the trapping of wild animals alone; Canadian fur farmers now breed silver, black, red and blue fox, Persian lamb, raccoon, mink, marten and skunk, and a beginning has been made in the ranching of reindeer and musk ox for both skins, wool, milk and meat, one concern alone, the North American Reindeer Company, of Winnipeg, having been granted a concession of 73,750 square miles north of the Churchill River on which to graze caribou and reindeer. On these 48,000,000 acres the Government charges a rental of one-fourth of a cent per annum. The project was being got under way and the caribou gathered in during the spring of 1921, and important developments are expected within the coming decade, there being other concerns engaged in this new industry in Canada's far northern wilderness. The fur-farming industry, particularly that of fox-breeding, is one which at its inception exercised a strong appeal to the gambling instincts of certain of the Canadian people, and much money was lost in "wild cat" schemes. The industry has, however, now settled down to normal and economic development, and for the year 1920 its capital value was estimated to be \$4,722,905. There were then 587 fur farms in operation, including 309 in Prince Edward Island, 55 in Nova Scotia, 57 in New Brunswick, 80 in Quebec, 42 in Ontario, 2 in Manitoba, 2 in Saskatchewan, 15 in Alberta, 11 in British Columbia and 14 in the Yukon Territory. The number of silver foxes on farms was 13,694, with a total value of \$4,536,417, and of the total number of silver foxes on farms in Canada, Prince Edward Island possessed 9,307, Nova Scotia 670, New Brunswick 1,689, Quebec 666, Ontario 573, the Prairie Provinces 501, British Columbia 79 and the Yukon 209.

A description of Canada's vast natural resources would be seriously lacking without mention of the wonderful WATER POWERS of the Dominion, and in view of what has already been stated regarding the distribution of the coalfields, abundant in the East and West, but absent in the industrial areas of Ontario and

Quebec, the fortunate position of these two Provinces in the matter of hydro-electric energy is notable. The late President Theodore Roosevelt is reported to have said some years ago: "A single generation will see the exhaustion of our natural resources of oil and gas, and such a rise in the price of coal as will make the price of electrically transmitted water power a controlling factor in transportation, in manufacturing and in household lighting and heating." While the oil resources of the United States are notoriously becoming depleted, the recent discoveries in the Mackenzie district of Canada appear likely to delay the fulfilment of part of this prophetic statement so far as the Dominion is concerned. However this may be, Canada's rich heritage in water powers is destined to prove one of the predominant factors in her progress as an industrial nation within the next generation. Already the *per capita* water power development in Canada is larger than that of any country in the world, with the single exception of Norway, and the Dominion ranks next to the United States in the amount of its potential and developed water powers. The United States has utilised about 25 per cent. of her available horse power, and Canada in the populated sections has developed about 21 per cent., but only about 9 per cent. of the total horse power which may at some time become available. Canada's available water power has been estimated to amount to 18,255,000 H.P. on the basis of twenty-four-hour power at 80 per cent. efficiency for an "ordinary minimum flow." This "ordinary minimum flow" is a figure reckoned on the averages of the minimum flow for the lowest two consecutive seven-day periods in each year over the period for which the authorities have collected information. The "estimated flow for minimum development," *i.e.*, dependable for at least six months of the year, is 32,076,000 H.P. The actual method to determine this figure is to arrange the months of each year according to the day of the lowest flow in each, it being borne in mind that

for climatic and other reasons the amount of water proceeding down stream may vary considerably on two given days, and on some streams may stop altogether when frozen up. The lowest of the six high months is taken as the basic month, and the average flow of the lowest seven consecutive days in this month determines the maximum for that year. The average of such maximum figures for all years in the period for which data are available is the estimated maximum used in the calculation. This estimated maximum development is based upon the assumption that it is good commercial practice to develop wheel installation up to an amount the continuance of which can be assured during six months of the year, on the assumption that the deficiency in power during the remainder of the year can be profitably provided from storage or by the installation of fuel power plants as auxiliaries.

An analysis of the water power plants scattered from coast to coast gives an average machine installation 30 per cent. greater than the six-month flow maximum power. It is evident, therefore, that the 32,000,000 H.P. available in Canada during at least six months would permit of a turbine installation of 41,700,000 H.P., as compared with the 2,471,000 H.P. installed up to the summer of 1921, this reaching only 5.9 per cent. of the recorded water-power resources. Hydro-electric development is proceeding rapidly, in spite of extra costs of construction, as compared with pre-war experience, but should the rate of water-wheel installation reached during the past fifteen years be merely maintained and not greatly exceeded, as is probable, there will be installed, in 1925, 3,360,000 H.P.; in 1930, 4,110,000 H.P.; in 1935, 4,860,000 H.P.; and by 1940, 5,600,000 H.P. The water-power developments already in operation in the Dominion represent an investment of not less than \$475,000,000. By 1940, however, should the rate of growth foreshadowed above be maintained, this investment will have grown to over \$1,000,000,000. The present developments of hydro-

electric energy are extremely important, particularly to the Provinces of Ontario and Quebec, which lack domestic coal supplies, and have to import fuel from Pennsylvania or elsewhere at great expense to their industries. It is estimated that the amount of coal saved by the utilisation of water powers in Canada reaches annually some 18,500,000 tons, worth, at \$8 a ton, \$148,000,000. This sum is, from the national point of view, equivalent to a return of 27·5 per cent. per annum on the capital invested in water-power development, and is thus held to justify further efforts on a large scale to utilise hydro-electric energy in order to free the Dominion from dependence upon the United States for essential fuel for her factories and homes.

Of the developed water powers, about 78 per cent. of the energy is used for municipal purposes, about 14 per cent. for the pulp and paper industries, and about 8 per cent. for electro-chemical or similar processes. The products of the electro-chemical industry are extremely diversified, including aluminium, ferro-silicon, calcium carbide, cyanamid, ferro-alloys, magnesium, graphite, carborundum, chlorine and other products indispensable in arts and manufactures, one of the most important processes being the fixation of atmospheric nitrogen, for which 30,000 H.P. was being used in 1920 at Niagara Falls by the American Cyanamid Company. Of the developed hydro-electric plants, that of the Niagara system, being increased to 750,000 H.P. under public ownership, is the largest, supplying 120 municipal distributing systems and serving an area already nearly 200 miles long and over eighty miles wide. The privately-owned Shawinigan system, in Quebec, with a load in 1920 amounting to 205,000 H.P., supplies seventy-six systems, and serves a triangular area with a base of 140 miles and a height of seventy-five miles. The combination of cheap power, favourable living conditions for workers, unpolluted air, and good labour supplies is rapidly transforming many parts of Canada from a country almost wholly agricultural in

character to one in which the manufacturing interests are of great and growing importance.

The distribution among the Canadian Provinces of the available and developed water powers is given below in the following table :—

Available and Developed Water Power in Canada.

Province.	Available 24-hour power at 80 per cent. efficiency.		Turbine Installation.
	At ordinary minimum flow.	At estimated flow for maximum development (dependable for six months).	
	H.P.	H.P.	H.P.
British Columbia ...	1,931,142	5,103,460	304,535
Alberta ...	475,281	1,137,505	32,492
Saskatchewan ...	513,481	1,087,756	—
Manitoba ...	3,270,491	5,769,444	83,447
Ontario ...	4,950,300	6,808,190	1,052,048
Quebec ...	6,915,244	11,640,052	925,972
New Brunswick ...	50,406	120,807	21,180
Nova Scotia ...	20,751	128,264	35,774
Prince Edward Island	3,000	5,270	1,933
Yukon and North-West Territories ...	125,220	275,250	13,199
	18,255,316	32,075,998	2,470,580

It will be noted that the greatest development has taken place in the manufacturing Provinces of Ontario and Quebec, which would otherwise be almost entirely dependent for their power on coal imported from Nova Scotia or the United States, while Provinces in which hydro-electric development has taken place on a minor scale are already well supplied with power fuel in the form of domestic coal and lignite. The administration of these resources is vested normally in the Provincial authorities, although the Dominion Government, through the Water Power Branch of the Department of the Interior, has undertaken a hydrometric survey of the newly-opened areas of Canada and exercises a

general supervision over the water powers of Saskatchewan, Alberta and the Yukon. In the last-named territory some 13,000 H.P. has been developed, chiefly for gold-dredging and to supply power to Dawson. Alberta already has an important source of electrical energy in her coal-fields, and uses her streams largely for irrigation purposes, but she has some 33,000 H.P. at present installed, mainly on the Bow River. Saskatchewan has not much potential hydro-electric energy in her settled areas, and very little has been developed up to the present time, although in connection with the lignite developments in the south-eastern portion of the Province it may in time be found feasible to transmit electric power steam-produced at the mine, as is already done on a large scale from the coal-fields of Nova Scotia. Manitoba, Ontario, Nova Scotia and New Brunswick have their water-power resources administered by Provincial bodies, which are now engaged on projects for the development of existing power sites, the installation of new plants, the storage of power, and its transmission from central electric stations to a large number of municipalities and industrial concerns. For example, the Manitoba Power Commission is purchasing from the Winnipeg City Corporation a sufficient amount of power to supply twelve other municipalities, this being derived from the Winnipeg River, which, with its tributaries, has a continuous flow capable of eventual development up to 500,000 H.P., about 20 per cent. of which is already being utilised; further extensive developments are being projected by private interests, including a proposed new power site on the Winnipeg River, calculated to have an ultimate capacity of 168,000 H.P., and likely to be completed in 1924. Reference has already been made to the work of the Hydro-Electric Power Commission of Ontario, which operates thirteen systems throughout the Province, of which the Niagara system is by far the most important. The New Brunswick Electric Power Commission is engaged

on development work on a number of rivers, while a few lumber and pulp and paper companies have individual projects under way. The Nova Scotia Power Commission has installed 25,000 H.P. for the benefit of the city of Halifax and other municipalities, and to develop additional power for the pulp and paper industry. Quebec has a Streams Commission, which conserves the water powers of the Province and has already executed a number of storage projects, including the Gouin Dam, on the St. Maurice River. The main development of these resources, however, has been left to private enterprise, and various public utility corporations, as well as logging, pulp and paper, cement, textile and flour-milling companies, have carried out extensive schemes. In the vicinity of Montreal hydro-electric energy has almost completely replaced other sources of power, and a number of Canadian and American industries have been induced to locate on the Montreal system as a result of this development. Many industrial enterprises, including electro-chemical and electro-metallurgical works, would never have been undertaken had not this means of obtaining cheap power been available. Further projects now contemplated include installations on the St. Maurice River with an ultimate capacity of 280,000 H.P.; and there are also the enormous possibilities presented by the scheme under discussion to canalise the St. Lawrence for ocean shipping, this involving, *inter alia*, the construction of dams between Morrisburg, Ontario, and Lake St. Francis, Quebec, enabling water-power development up to some 5,000,000 H.P. Private enterprise has developed the water-power resources of British Columbia, and to-day hydro-electric energy is utilised very extensively for certain mining operations, for irrigation purposes, in the steel industry, in the manufacture of nitrate of soda, in the saw mills and in the pulp and paper industry. Projects now under consideration include the electrifying of certain railway lines, including the C.P.R., which recently found it necessary for a time to give up

oil fuel consumption on its locomotives owing to dearth of supplies; as well as important power development schemes on the Bridge and Campbell Rivers.

Canada's rich coal resources; her innumerable quick-flowing streams, capable of being harnessed for electrical energy; and her almost inexhaustible stores of raw materials of every description; obviously fit her to develop into a MANUFACTURING COUNTRY of no mean importance, and remarkable progress in this direction has been made even now. In 1890 the output of manufactured products was valued at \$368,700,000. Ten years later, in 1900, the total was about \$480,000,000. The output for 1910 was estimated to be worth \$1,165,975,000; for 1915, \$1,381,547,000; that for 1917, \$3,015,577,000; and that for 1918, \$3,458,036,975. While such a rate of acceleration may perhaps be abnormal, having been greatly stimulated by the need of supplies of war material and munitions between 1914 and 1918, yet there is little doubt that the manufacturing industries of Canada are firmly established upon the secure basis of ample supplies of the principal materials of industry, of cheap water power, and of a high degree of mechanical and managing skill. The domestic market in the Dominion has a vast power of absorption both of Canadian-made and of imported goods, and Canada is producing a large number of lines which find a ready market in those foreign countries now reached by her rapidly-expanding mercantile marine services. Probably considerably more than \$3,000,000,000 is now invested in manufacturing enterprises, and one marked result of the war has been the change in the relative importance of agricultural and industrial products in the export trade returns, due, no doubt, in part to the three bad harvests of 1917, 1918 and 1919, and to the high prices at which manufactured goods were then being sold. The great increase in the proportion which manufactured products bear to the total exports from Canada during the period of hostilities and the post-war era is of profound significance, and

it is hardly likely that much, if any, of the impetus given by the war necessities to industrial activity will be lost. It is, of course, conceivable that such a rapid development in industry may not be an unalloyed blessing, and the large increase in the town populations as compared with those engaged in rural pursuits, as revealed by the 1921 Census returns, has given rise to some comment among the critics of the Dominion's tariff policy. It is often maintained by spokesmen for the agricultural interests that the establishment under the shelter of a tariff of numerous manufacturing industries, drawing upon the available supply of labour sometimes to the detriment of the farms, and engaged to some extent not so much in the working up of home-produced raw materials as in the further manufacture of raw, semi-manufactured products imported for the purpose from countries to which they may subsequently be re-exported in a higher state of manufacture, is open to adverse criticism. Against this, however, it is contended that any drain which the development of the manufacturing industries of the Dominion may at certain times have exerted upon the labour supply available will, now that immigration has been resumed after the war, be amply met; and it is important to bear in mind that, in the absence of manufacturing developments in the Dominion itself, the inevitable trend of population from rural districts to cities observable in every country in the world would probably have resulted in the migration from Canada to the industries of the United States of much of the skill and enterprise of the capitalist and artisan classes of Canada, now retained on remunerative work which is assisting in the building up of an important industrial unit in the structure of the British Empire.

The "MADE-IN-CANADA" movement is daily gaining strength in the Dominion, and the Government is in sympathy with the campaign particularly as a means of relieving the difficult exchange situation arising from the over-importation into Canada of United States

products. Canadian men of business have found that the world exchange situation since the Armistice seriously curtailed orders from overseas, especially for manufactured goods, and the need has been keenly felt for a home market to occupy the new or enlarged plants established during the war to fill Government orders for war materials, munitions, etc.

The Dominion Bureau of Statistics at Ottawa has published interesting data derived from the Census of Industry taken in 1918, and this information is supplemented year by year in a series of special reports on particular industries, very ably prepared, which afford a reliable estimate of developments, being published not many months after the period with which the reports have to deal. The returns for the 1918 Census cover 35,797 establishments, located by Provinces as follows:—Ontario, 15,365; Quebec, 10,540; Nova Scotia, 2,125; British Columbia, 1,786; Manitoba, 1,444; Saskatchewan, 1,422; New Brunswick, 1,364; Alberta, 1,252; Prince Edward Island, 484; and the Yukon Territory, 15.

CANADIAN MANUFACTURING INDUSTRIES.

CAPITAL, MATERIALS AND PRODUCTS BY PROVINCES, 1918.

Provinces.	Capital invested.	Cost of Materials.	Value of Products.
	\$	\$	\$
Ontario . . .	1,508,011,435	1,008,824,704	1,809,067,001
Quebec . . .	860,468,768	472,444,599	920,621,171
British Columbia . .	244,697,241	109,403,517	216,175,517
Nova Scotia . . .	133,262,649	93,540,657	160,409,890
Manitoba . . .	105,983,159	92,600,183	145,031,510
Alberta . . .	61,405,933	54,740,907	82,434,422
New Brunswick . .	74,470,879	34,513,640	68,333,069
Saskatchewan . .	39,476,260	30,614,183	50,009,635
Prince Edward Is- land . . .	2,886,662	3,547,800	5,693,878
Yukon . . .	3,638,929	22,124	260,882
Total for the Domi- nion . . .	3,034,301,915	1,900,252,314	3,458,036,975

The summary on p. 46 shows the amount of capital invested, the cost of materials and the value of products in Canadian industry by Provinces, arranged in order of the value of production.

EMPLOYEES, SALARIES AND WAGES, 1918.

The number of persons employed on salaries and on wages by Provinces is presented below, in order of the value of production :

Provinces.	Employees on Salaries.		Employees on Wages.	
	Number.	Salaries.	Number.	Wages.
		\$		\$
Ontario	39,212	56,802,691	294,724	264,357,523
Quebec	20,835	29,667,542	186,678	146,132,433
British Columbia	4,588	6,902,901	39,451	43,519,262
Nova Scotia	2,163	2,548,097	26,873	22,266,132
Manitoba	3,222	4,809,254	20,665	18,580,427
Alberta	1,881	2,524,699	8,013	7,724,766
New Brunswick	1,792	2,453,825	18,096	11,793,563
Saskatchewan	1,291	1,588,665	6,775	6,907,507
Prince Edward Island	194	124,789	1,273	652,278
Yukon	20	40,021	41	64,488
Total for the Dominion	75,198	107,462,484	602,589	521,998,379

THIRTY LEADING INDUSTRIES.

The principal statistics of the thirty leading industries in the Dominion and the totals for all industries are presented in the table overleaf. The capital invested in the thirty industries was 68·4 per cent. of the total for the whole Dominion, employees were 62·3 per cent., salaries and wages 65·5 per cent., and the value of products 66·8 per cent.

An important post-war development in Canadian industry—and one which it is earnestly to be hoped will undergo considerable expansion in the near future—is

Industries.	Capital.	Em- ployees.	Salaries and Wages.	Value of Products.
	\$	No.	\$	\$
Flour and grist mill products . . .	78,303,022	7,407	7,555,476	262,537,122
Slaughtering and meat packing . . .	86,969,756	11,816	12,153,501	229,231,666
Rolling mills and steel furnaces . . .	109,538,103	20,047	27,653,972	209,706,319
Munitions . . .	54,112,884	36,760	45,914,822	186,034,920
Lumber, lath and shingles . . .	182,254,740	60,868	49,786,122	146,333,192
Pulp and paper . . .	241,344,704	25,863	26,974,226	119,309,434
Butter and cheese . . .	19,079,912	7,305	5,503,594	94,927,032
Foundry and machine shop products . . .	84,122,446	26,463	28,960,374	82,493,897
Shipbuilding and repairs . . .	56,299,033	21,705	26,350,128	74,799,411
Cottons . . .	53,796,394	16,004	9,227,343	66,399,228
Cars and car works . . .	32,217,295	11,739	13,126,459	66,068,705
Smelting . . .	56,135,981	5,508	8,639,472	62,482,256
House-building . . .	36,722,958	21,107	20,693,169	60,522,151
Sugar, refined . . .	37,256,851	2,558	2,626,890	58,812,219
Electric light and power . . .	401,942,402	9,640	10,354,242	53,449,133
Boots and shoes . . .	33,274,753	9,246	9,425,097	46,387,665
Hosiery and knit goods . . .	31,092,866	12,627	7,231,182	45,755,129
Plumbing and tin-smithing . . .	28,531,076	10,622	9,136,367	41,870,529
Car repairs . . .	72,322,688	16,531	18,677,388	40,972,617
Drugs and chemicals . . .	26,029,530	4,292	5,872,947	38,252,587
Tobaccos, cigars and cigarettes . . .	23,284,799	7,897	5,338,347	37,883,974
Agricultural imple-ments . . .	74,410,603	10,072	10,268,539	34,853,673
Fish, preserved . . .	30,334,129	5,710	3,566,442	34,007,628
Clothing, men's factory . . .	25,703,795	8,961	7,560,749	33,835,793
Leather, tanned, curried, etc. . .	28,435,806	3,631	3,464,845	33,273,925
Clothing, women's factory . . .	19,020,092	10,853	8,006,246	32,364,340
Printing and publishing . . .	30,110,354	12,277	10,875,418	30,325,123
Electrical apparatus and supplies . . .	43,285,405	8,859	8,449,841	30,045,399
Boilers and engines . . .	28,891,924	7,803	83,40,221	29,470,457
Lumber products . . .	31,806,543	8,226	6,390,083	29,425,925
Totals, thirty industries . . .	2,076,630,844	422,397	418,623,502	2,311,831,449
Totals, all industries . . .	3,034,301,915	677,787	629,460,863	3,458,036,975

that connected with the establishment in the Dominion by British manufacturers of subsidiary plants at which to handle the Canadian portion of their business. Among the best-known of the concerns already engaged in building up Canadian plants are Baldwin's, Ltd., the Welsh steel and tinplate manufacturers, who at Toronto are manufacturing tinplate and sheets in a plant which it is expected will eventually become one of the largest in the world for this line; Vickers, Ltd., have an important shipyard at Montreal; the Brunner-Mond soda plant at Amherstburg is certain to undergo great development in view of the gradual introduction of the soda process of wood-pulp production; Alex. Cross & Sons, Ltd., the Scottish chemical fertiliser manufacturers, have established themselves at Welland, Ont.; the English Electric Co., Ltd., at St. Catharines, Ont. The iron and steel plant of Coast Range Steel, Ltd., which was to have been established in that Province, was also under British auspices, as is also the Britannia wire rope plant recently set up near Vancouver, B.C. The British Empire Steel Corporation, Ltd., while primarily an amalgamation of Canadian steel, coal and shipbuilding concerns, has strong support in the United Kingdom, and will no doubt utilise to the full the capital and technical guidance obtainable as the result of the co-operation entered into. British experience and as much British capital as can be freed for Canadian enterprises are in great request by Canadians for the exploitation of their rich heritage, the value of which is thoroughly realised by capitalists and industrialists in the United States, who have pursued in a most marked degree the policy of establishing in the Dominion branches of their manufacturing plants. According to official figures, American capital is being invested in Canadian industries and securities at the rate of \$200,000,000 a year. About 30 per cent. of the \$275,000,000 invested in Canadian pulp and paper enterprises is American. Up to the end of 1920 there were some 600 branch or subsidiary manufacturing or

assembly plants set up by American industrial concerns, some 200 of these having gone across the border in 1919 alone. It must be borne in mind, however, in this connection, that such concerns are registered as Canadian companies, and Canadian capital is generally invited at their foundation, the tendency being for them to come very largely under the management and control of Canadians and to be staffed by Canadian workers. It is, nevertheless, estimated that Americans have invested upwards of \$1,250,000,000 in these branch plants, as compared with a total not more than one-fifth of this amount invested up to 1914. Various reasons are advanced for the founding of these branch factories, among which may be cited :—

(a) To enjoy the benefits of any trade arrangements made for the units of the British Empire ;

(b) To handle the export orders received by the parent company for delivery in the United Kingdom and other parts of the British Empire ;

(c) To grow as a Canadian industry with the expanding market and the increasing purchasing power of the markets reached ;

(d) To handle the Canadian market at close range ;

(e) To escape the difficulties incurred in the Canadian market by reason of the adverse exchange rates, the tariff, etc. ;

(f) The efficient advertising of many of the municipalities, particularly in Ontario, which grant to prospective manufacturers in their limits tempting advantages in the way of free sites, tax exemption, etc.

The recommendations set forth above carry added weight from the remarks quoted below from a recently-published statement by Sir Peter Rylands, ex-President of the Federation of British Industries :—

“ Manufacturers in Great Britain can also help in the development of the Dominion by investing capital in Canada. One of the most important ways by which this can be effected is by the erection of British factories

there. The United States has already recognised the importance of such action, and it is significant that in 1919 in the city of Toronto alone twenty-one American branch factories were opened as against one British. In fact, it is only to be expected that the United States, favoured as she is by her geographical juxtaposition, will do everything in her power to exploit the great riches of the Dominion.

"Difficult though it may be at the present moment for industrialists in the United Kingdom to find the capital necessary for opening up works in Canada, it should not be lost sight of that the chance of securing a share for the United Kingdom in the great industrial future of Canada which exists to-day may be gone to-morrow."

While no patriotic person, and indeed any one acquainted with the financial position of so many British manufacturers faced with the heavy post-war taxation, and other difficulties inseparable from the reconstruction period, would advocate a wholesale policy of emigration of capital or labour from the United Kingdom, there are important considerations arising from post-war conditions which should lead a much larger number than at present to go very carefully into the possible advantages of establishing in a new country like the Dominion of Canada at least the nucleus of a manufacturing plant which will grow with the country and serve the rich Canadian market on the spot. The altered relative position of Europe, both politically and economically, after the ruinous war from which hardly any part of the world has yet recovered; and the resulting increase, comparatively speaking, in the wealth and influence of countries formerly tributary to Europe either politically or in matters of finance, industry or trade, seem to point to the necessity for clear thought as to the prospects in the coming generation for a country, like the United Kingdom, dependent largely on imported raw materials and dear coal-produced industrial power for its ability to supply

foreign markets with goods which foreign countries everywhere are more and more developing facilities to manufacture for themselves. The United Kingdom has, to place against some of its post-war disadvantages, so many very positive sources of strength, notably in the hereditary skill of its workers and the gradual tendency now revealing itself to work in harmony rather than at loggerheads with management and capital, that one would be foolish to look at the future with a too pessimistic eye. Nevertheless the Dominion of Canada, with its large and growing market for every description of manufactured goods; with its notable facilities for export to foreign markets; with its unrivalled resources in raw materials of every kind to obtain which the United Kingdom must rely on importation from abroad; and its cheap hydro-electric powers, appears to possess many claims to consideration from the British manufacturer who wishes to insure against some of the difficulties of the future, as well as to reap a present harvest by venturing some portion of his available capital in a Canadian branch factory or assembling plant. Many firms have already done this, as indicated already in this work; some of them with vast resources have set up their own factories but others, less fortunate, are combining to co-operate with Canadian manufacturers having suitable plants in which to turn out specific non-competitive lines capable of being marketed by one force of commercial travellers serving the entire plant. Factory sites in Canada may be obtained in hundreds of places which possess ready access both to rail and water transportation routes. Most of the larger Canadian cities maintain industrial bureaus whose chief duty lies in the extending of assistance to manufacturers seeking sites, but in some localities it will be found unnecessary either to buy a site or build a plant, there being probably still some "war" plants awaiting tenants which may be leased for long periods at reasonable rentals. So far as labour is concerned, the high calibre of the Canadian working

man is acknowledged by those United States manufacturers, who have in such large numbers recently located in Canada, and although the housing situation in the Dominion has been acute since the Armistice, there may, with the expected trade revival, be in certain neighbourhoods some possibility of transferring skilled workers from the United Kingdom, where there are many seeking occupation. The comparative homogeneity of Canada's population has been a primary factor in producing a workman who is, as compared with American experience, level-headed, intelligent and industrious, and the Province of Quebec in particular has a high post-war reputation in the matter of immunity from strikes. The Canadian Industrial Disputes Investigation Act has a high reputation as an instrument in preventing strikes, and educational facilities for the training of skilled workmen and technical managers are unrivalled, the banking system also being of a very high standard both for domestic and foreign business. The growing cities of the West are so anxious to attract manufacturing industries that the Alberta Industrial Development Association in 1920 sent a special representative to Europe especially to invite British manufacturers to examine the opportunities offered by that Province for the establishment of manufactures suitable to the locality and the market. A company has been formed in Canada, which is connected with one of the Chartered Banks, for the special purpose of encouraging the establishment of British branch factories in the Dominion, and this company is so much in earnest in its desire to bring home to manufacturers in the United Kingdom the excellent opportunities which exist for industrial enterprise in Canada that it is contemplating the provision of a substantial share of the requisite capital. British experience and British capital are desired by Canadians for the development of industry, and any firms who will take the trouble to investigate those opportunities will lack no assistance from those capable of advising them.

The following figures illustrate effectively Canada's wonderful expansion since Confederation in 1867 :—

	1867.	1921.
Paid-up bank capital	\$30,289,048	\$128,460,163
Population	3,371,594	8,714,103
Bank deposits	\$37,678,571	\$1,897,119,580
Fire insurance in force	\$188,359,809	\$4,585,928,617
Life insurance in force	\$35,680,082	\$1,765,376,691
Post offices	3,638	122,511
Railway gross earnings	\$12,116,716	\$382,976,901
Railway mileage	2,278	39,196
Total trade	\$131,027,532	\$2,450,553,175
Immigration	None.	147,000
Government revenue	\$13,687,928	\$451,366,020
Government expenditure	\$13,486,092	\$357,515,278
Customs duties	\$8,801,446	\$102,812,951
Vessels registered	5,693	8,568
Manufacturing capital (1867 and 1918)	\$77,964,020	\$3,034,301,915
Employees	187,942	677,787
Salaries and wages	\$40,815,009	\$629,960,863
Values of products	\$221,617,773	\$3,458,036,975
Public net debt	\$75,757,135	\$2,311,294,443
Agricultural exports	\$12,871,055	\$416,122,771
Animal products exports	\$6,893,167	\$314,017,944
	1871.	1920.
Mineral production	\$10,000,000	\$217,000,000
Fishery products	\$6,577,391	\$49,247,279
Forest products	None.	\$146,333,192
Manufactures, exports of	\$2,100,411	\$403,132,161
Telephones	None.	724,500
Elevators	None.	4,000
Water-power development	None.	2,417,896 H.P.

CHAPTER III

CANADA'S SPLENDID TRANSPORTATION FACILITIES

IN a country with the enormous area of the Dominion of Canada the extent and efficiency of the various systems of transportation—water, railway, road and air—must be of cardinal importance, and Canada is particularly well favoured in this respect, nature having provided an almost unrivalled system of rivers and lakes, which are now, and are destined to remain for a very long time, cheap and serviceable means of communication from place to place. It is doubtful if any great country is better supplied than is Canada with the means of inland WATER TRANSPORTATION, and the River St. Lawrence, which already stands in a notable position among waterways as the historical first avenue of traffic from Europe to North America, is likely (if proposals recently under consideration by the International Joint Commission go forward to practical measures) to become by far the most important highway of commerce in the world. The proposals in question involve the deepening of the 14-foot St. Lawrence canals to 25 feet or 30 feet, which, together with the deepening of the 22-foot Sault Ste. Marie lock and the completion of the new Welland Ship Canal, would enable 90 per cent. of the world's freight steamers to pass straight through from the ocean to the head of the Great Lakes in the centre of the continent, thus relieving the Atlantic ports of an enormous volume of trans-continental traffic now congesting the various railway systems converging upon New York, Baltimore, Boston, etc. The carrying out of this project would make ocean ports of Port Arthur and Fort William, Hamilton, Toronto, etc., as well as

the American cities of Milwaukee, Duluth, Chicago, Detroit, Toledo, Cleveland and Buffalo, and the scheme has very strong backing from business interests in the Middle Western States, as well as in Canada. It is estimated that the cost of transshipment and rehandling of freight from the Canadian or American West to European ports amounts to fully 50 per cent. of the entire shipping charges, and that, if the suggested improvements could be carried into force, freight rates from Europe to the interior of the continent could be reduced by from 25 to 40 per cent. The engineers of the International Joint Waterways Commission estimate the cost of the scheme recommended by them to be \$250,000,000, for which ample compensation is promised resulting from the hydro-electric power developments to be carried on in combination with the engineering works connected with the waterway improvement, these developments having in contemplation the utilisation of one-third of the theoretical power of the St. Lawrence, said to be about 5,000,000 H.P. The improvement will save each country hundreds of millions of dollars annually, tending to reduce Canadian imports of coal and permitting the landing of goods at western points at rates little more than those charged for Eastern Canadian centres.

Another vast inland waterways project has also been under consideration during recent years, and is to some extent in competition with the St. Lawrence canal scheme. This alternative project envisages the canalisation of the tributaries of the Ottawa River to afford a through route to Montreal from Lake Superior *viâ* Georgian Bay. The advantages claimed for this route, as against the deepening of the St. Lawrence canal system, are that it would be much less expensive in construction, that there would be no great engineering difficulties to be overcome, that there would be fewer locks, and that the works would incidentally reclaim 2,000 square miles of farm lands in Eastern Ontario now under swamps. While vessels from cer-

tain ports would have to travel a longer distance, it is considered that this all-Canadian route, free from possible international complications, would prove to be cheaper by nearly \$100,000,000 than the St. Lawrence River scheme.

The canals at present in existence are, however, by no means a negligible element in Canadian transportation. They have been created at a capital cost of over \$125,000,000, and have a total mileage of 117 miles, forming parts of inland waterways amounting to not less than 1,600 miles, with a tonnage amounting in the record year 1913 to some 52,053,913 tons, including much American as well as Canadian traffic. Part of this great canal system provides the main channel through which the grain of the Western Provinces passes from the head of Lake Superior to the Atlantic seaboard, and as large a volume as 142,000,000 bushels has been moved eastward in a single season. Wheat shipments from the head of the Great Lakes from September 1st to the close of navigation in 1920 totalled 85,500,000 bushels, as compared with 52,900,000 bushels in 1919 and 50,000,000 bushels in 1918. Rail shipments to the United States during the same period—*i.e.*, up to November 30th, 1920—totalled 3,614,628 bushels.

It requires, therefore, no great imagination to visualise the part which water transportation has played in the upbuilding of Canada. The railroads, which have linked the Atlantic with the Pacific by a bond of steel, have assisted immensely in the settlement of the widely distributed agricultural regions of the West, but without Canada's wonderful water highway from the centre of the continent to the sea coast the railways would have found it physically impossible alone to move the grain crops of Western Canada to their market or to transport the large quantity of coal so essential to the industrial life of the central portion of the Dominion. Storage elevators with an aggregate capacity of 50,000,000 bushels (including the great 10,000,000-

bushel elevator of the Canadian National Railways) have been built at Port Arthur and Fort William, and other elevators have been constructed at strategical points at the eastern end of the Great Lakes system, which, in conjunction with some 3,000 interior elevators distributed throughout the grain belt and the great terminal elevators and warehouses at Montreal, Quebec, St. John, Halifax and Portland (Maine), afford unrivalled facilities for expeditious and economic handling of the crop. During the year 1920 some 4,010 vessels, with a net tonnage of 5,141,000 tons, passed through the Canadian locks at Sault Ste. Marie, Ontario. The total number of passengers carried was 43,455, and their cargoes reached a total of 2,477,000 tons.

The great Canadian lakes, rivers and canals are extensively utilised for both freight and passenger traffic. Passenger steamers are run daily on the St. Lawrence and other rivers, and there are steamers plying between Montreal, Quebec, Nova Scotia, New Brunswick and Prince Edward Island ports. The Maritime Provinces have local steamship lines by which all the important seaports of these Provinces may be reached. There are steamboat lines on the important New Brunswick rivers, while in the Prairie Provinces in the West they ply on the Red River, Lake Winnipeg and the Saskatchewan River. There is a steamer service down the great Mackenzie River to Fort McPherson, within a few miles of the ocean, and a project is mooted for connecting the Great Slave Lake, in the Far North, with Hudson's Bay by a combined railway and steamboat service. In British Columbia there are steamers running on many of the navigable lakes and rivers in the interior, while there are regular lines of steamers, including those under the auspices of the Canadian Pacific and Canadian National Railways, running from Vancouver and Victoria to all important points along the Pacific coast of Canada and the United States. There is also an extensive coasting trade on the Atlantic side, also steamers

running from Canadian to United States ports, and others connecting Canadian eastern ports with those of British Columbia by way of the Panama Canal. Rates for both passengers and freight on Canada's water transportation lines are remarkably cheap in comparison with other systems of transport in the Dominion or elsewhere.

The Canadian Pacific and Canadian National Railways transport both passengers and freight by water along the route provided by the St. Lawrence river and the Great Lakes to the Middle West of the continent, and one great lake steamship organisation—Canada Steamship Lines, Limited—has developed its inland freight-carrying service into an ocean service as well, running vessels across the Atlantic to British, French and Scandinavian ports in conjunction with shipping concerns in the countries served by these new services. The further development of the Great Lakes—St. Lawrence waterway, to which reference has already been made, obviously portends a great increase in the traffic of this and other concerns established in the inland transportation trade. Seventeen ships of Canada's Government merchant marine fleet can pass through all the Canadian and international inland canals, and can be employed in the lake carrying trade.

The gross mercantile marine tonnage on the Canadian register at the end of June was 1,583,000 tons. As an indication of what this means it may be said that the total gross tonnage of all other British Dominions outside of the United Kingdom is only equal to 400,000 gross.

The RAILWAYS of Canada, however, have a peculiar importance, since they constitute over large areas of country almost the sole means of communication between one district and another, and the growth of railway mileage, extravagantly conceived as it has often been, has been a conspicuous feature of the development of the material interests of the Dominion. All settled parts of Canada can now be conveniently

reached by railway or steamship lines. At the end of 1920 Canada had 39,196 miles of completed steam railways, in addition to which there were about 7,000 miles of railroad in the United States controlled by Canadian interests. Out of the total railway mileage in the Dominion, 21,862 miles were owned or controlled by the Canadian Government, 18,859 miles by the Canadian Pacific Railway Company, while of the remaining mileage 2,063 miles were owned by small independent lines, 2,284 miles by American companies having extensions in Canada, and 328 miles by the Ontario Government. The capitalisation of the Canadian lines is in excess of \$2,020,000,000, of which \$1,140,000,000 is represented by bonds, almost wholly held abroad, and chiefly in Great Britain. The public aid given to railways by the Dominion, Provincial and municipal authorities in the form of cash totals \$275,000,000, to which must be added guarantees aggregating \$342,317,649 and 44,096,989 acres of land. The growth of traffic has kept pace with mileage. Commencing with 5,190,416 passengers and 5,670,837 tons of freight in 1875, these figures had been raised to 46,702,280 passengers and 101,393,989 tons of freight in 1914, and to 78,371,716 passengers and 116,699,572 tons of freight in 1919, gross earnings having risen since 1875 from \$19,470,539 to \$382,976,901. Electric railways also play an important part in both passenger and freight transport, carrying in 1914 some 614,709,819 passengers and 1,845,923 tons of freight, and in 1919 686,124,263 passengers and 2,474,892 tons of freight. The number of miles of railway in each Canadian Province, and the number of people per mile, is as follows :—

Province.	Miles of railway.	Population per mile.
Ontario . . .	11,000	260
Quebec . . .	4,792	420
Manitoba . . .	4,168	133
Saskatchewan . . .	6,162	105

Province.	Miles of railway.	Population per mile.
Alberta . . .	4,273	.. 116
British Columbia . . .	4,227	.. 106
New Brunswick . . .	1,959	.. 180
Nova Scotia . . .	1,428	.. 367
Prince Edward Island . . .	279	.. 336

No one can think of Canada's railways without remembering immediately what the Dominion owes to the marvellous enterprise of the founders of the Canadian Pacific Railway, and the efficiency and financial success of the concern at the present time. The Canadian Pacific Railway Company faced difficulties of many descriptions during the war, and has come through comparatively unscathed in times when nearly every other transportation system in the world is struggling with the problem of solvency. Its steamships were utilised during the period of hostilities for war purposes, and many were lost, involving the company in considerable difficulties as it endeavoured to reconstitute its normal services, covering practically every part of Canada and connecting the Dominion with European, Far Eastern, Australasian and West Indies ports. The Canadian Pacific Railway is well styled the "Empire's Greatest Railway," though the Canadian National system has now a longer mileage and is endeavouring, with much success, to emulate the universally-conceded good management of the competing transportation service. The C.P.R. was Canada's first transcontinental link, and to it Western Canada owes its existence as an economic entity in the Dominion. The railway has a mileage of 18,859, the main transcontinental line, from Montreal to Vancouver, being 2,885 miles long. The gross earnings of the system for the twelve months ended December 31st, 1919, were \$176,929,000; working expenses, \$143,996,023; and net earnings, \$32,933,036; and the number of employees reaches 75,000, operating an equipment consisting of 2,255 locomotives, 2,781

passenger cars, 87,681 freight cars, and 7,882 other cars, these being valued altogether at \$548,458,756. The company has a fleet of about sixty steamers, apart from its ocean services, and operates about 15,000 pole miles of telegraphs. The C.P.R. owns fifteen hotels of the highest standard from the Atlantic to the Pacific, the total capacity of which reaches 3,500 bedrooms.

The rise of the Canadian National Railways is of some interest in view of the fact that the nationalisation of over 50 per cent. of the railway mileage of the Dominion has been accomplished during the last few years. The new combination that came into existence with the taking over by the Government of the G.T.R. forms the greatest transportation system in the world, covering 21,862 miles of railways, 101,900 miles of telegraph lines, ten hotels, sixty-six ocean vessels with a total tonnage of 393,000 tons, eleven car ferries, four lake vessels and five British Columbia coast vessels. There had been in existence since shortly after Confederation in 1867 the Intercolonial and Prince Edward Island railways, the former having been an integral part of the pact with the Provinces of Nova Scotia and New Brunswick when they entered the Dominion, and in 1904 was begun the construction of the National Transcontinental Railway from Moncton to Winnipeg, as representing the eastern section of the Grand Trunk Pacific Railway system. The line was not taken over by the company operating the latter system in accordance with the agreement with the Government by which the N.T.R. was built, and in 1914 it was joined up with the Intercolonial line to form with it the Canadian Government Railways. The Canadian Northern Railway system, started as a local line in Manitoba in 1896, gradually built up in the prairie Provinces a system which by 1906 comprised more than 2,400 miles. The C.N.R. had to depend for west-bound traffic on what the companies in the east handed to it. On the traffic which it had in the west it lost the long haul to the east. It was equally natural that the Grand Trunk

Railway Company should reach out to the western prairie country, and there was thus an opportunity for co-operation between these two interests which, however, was not availed of, with the result that by 1916 Canada had three transcontinental systems, the C.P.R., the Canadian Northern and the Grand Trunk-Government system. Under war conditions the new lines proved to be unprofitable, and there was imminent danger that the private investors in these enterprises would suffer great loss through the inability of the companies to meet their charges. In this emergency the Government stepped in and took over these new lines, the Grand Trunk Pacific being added in 1919 owing to the inability of the Grand Trunk Railway Company to carry out its agreement to operate the National Transcontinental Railway to Moncton, N.B. The Government declined to relieve the Grand Trunk of its obligations in regard to the G.T.P. unless the Grand Trunk system itself were included in the national system, and this, after a great deal of negotiation, was arranged in the spring of 1921, the management of the system being engaged during that year in securing the gradual assimilation of the Canadian Northern, Grand Trunk and Grand Trunk Pacific lines with the Government railways in one organisation, to be known henceforth as the Canadian National Railways. The Government, in nationalising such an enormous system, has acted more from force of circumstances than from choice, but, in spite of heavy deficits due to war conditions and to post-war high wages and costs, it is hoped by the management that before many years have passed the combined system will be able to bear the weight of the many non-paying development lines, and that the operation of these branches will conduce to the building up economically of the districts through which they pass, and eventually justify their existence as units in a transportation system. In the Canadian National Railways the people of the Dominion have a system of communication, which, though in many

localities built before its time, has been constructed at pre-war costs, and will, for this reason, in due season become valuable to its owners—the people of Canada—not only from the development, but also from the financial, point of view. The lines have been divorced from any element of political control, being placed under the management of railway and business experts, who are endeavouring, in conjunction with the Canadian Government Merchant Marine, to get the utmost benefit possible out of the combined working of the various elements of the new system, reducing costs of operation to a minimum and rendering valuable service to districts served by the various main and branch lines. During the past few years a steady effort has been kept up to increase the number of freight cars on the Canadian National Railways, with the result that this year on the railways owned, operated and controlled by this great transportation system 122,000 freight cars are available for all work. During the three years 1919–1921, 21,358 freight cars were added to the equipment, and quite a number of locomotives of the latest types for present-day requirements. A Canadian National Railway train carrying 85,000 bushels of wheat, valued at \$132,600, was delivered at the Port Arthur elevators not long since. The train, which was three-quarters of a mile long, with a total tonnage of 6,320, travelled the distance between Winnipeg and Port Arthur, 438 miles, in twenty-two hours. This is said to constitute a new record in freight haulage.

The amalgamation into one system of two of the Canadian transcontinental lines affords an interesting variety of choice in regard to through passenger connections between the Atlantic and Pacific coasts, and an important addition to existing routes is provided by the Canadian National service leaving either Halifax, Sydney or St. John by trains connecting at Montreal with one running over the Grand Trunk line to Ottawa, thence over the Canadian Northern line to North Bay, Port Arthur and Winnipeg, or by

another train leaving Montreal over the Grand Trunk to Toronto and North Bay; thence over the Temiskaming and Northern Ontario Railway to Cochrane (on the old National Transcontinental line from Halifax *via* Quebec Bridge), and thence to Winnipeg direct. From Winnipeg the service takes one, *via* Saskatoon, to Edmonton over the Grand Trunk Pacific line; thence over the Canadian Northern to Vancouver, connecting at Jasper Creek, B.C., with a G.T.P. train for Prince Rupert, the northern British Columbia port of the combined system. The forthcoming completion of the Pacific Great Eastern line from Vancouver to Prince George, B.C., will afford an additional connection with the Grand Trunk Pacific section of the C.N.R. transcontinental system. The present route permits of a traveller leaving Halifax, N.S., at 8.10 a.m. on a Monday and arriving at Vancouver at 9 a.m. on the following Sunday.

In a country so large as Canada, whose 750,000 farms are many of them at a considerable distance from railway stations, there is an obvious need for good ROADS, and in this respect the Canadian people have been at some disadvantage up to recent times. The great progress of the automobile industry, however, and the general use, particularly by farmers, of the motor vehicle either for passenger or freight service, has brought about a keen desire for improvement in the country's road connections, and in 1919 the Dominion Parliament voted a sum of \$20,000,000 as a nucleus for the construction in each Province during the following five years of systems of roads more adequate to the needs of the rural and motoring populations. To their share of this grant the Provinces, of course, add funds from their own sources of revenue, making up an expected total expenditure of \$100,000,000; and this co-operation between the Dominion and Provincial authorities is likely within the next year or two to bring about a notable improvement in communications throughout the country districts of Canada, facilitating

the transport to market of agricultural and other products, as well as the distribution throughout the Dominion of manufactured products of every description. The mileage already projected is 17,951. The general programme statement, showing the mileage and the estimated cost of which each of the Provinces proposes to carry out under the Act, and towards which their portion of the federal appropriation will be applied, is as follows :—

Province.	Miles.	Estimated Cost. \$
Prince Edward Island .	850	850,000
Nova Scotia . . .	1,297	12,493,700
New Brunswick . . .	1,595	2,914,612
Quebec	1,433	17,390,000
Ontario	1,824	22,200,000
Manitoba	4,000	6,602,265
Saskatchewan . . .	2,500	5,329,500
Alberta	2,475	3,694,525
British Columbia .	1,977	10,015,050

The latest project in connection with a trans-continental highway, likely to be adopted in Canada, is that of the "King's International Highway," the shortest and most feasible route between Montreal and Vancouver, and the nearest approach to an all-Canadian highway. This has been mapped out and surveyed to pass through Ottawa, Mattawa, North Bay, Sudbury, Sault Ste. Marie, Winnipeg, across the prairie to Macleod, Crow's Nest Pass, Fernie, Cranbrook, thence to Vancouver.

The use of the motor truck by farmers, manufacturers and others has made remarkable progress in recent years, and the market in Canada for this class of vehicle is a very large one, which has justified the establishment in the Dominion of a large number of branch factories of American manufacturers of this class of vehicle already, and would, no doubt, also be

an encouraging prospect for British motor truck makers as well.

In the utilisation of the AEROPLANE for transportation purposes Canada has made probably as much progress as any country in the world of a like population, and the field for this class of vehicle in the vast Dominion is sufficiently obvious. Canadian aviators made a trans-Canada flight from Halifax to Vancouver in October, 1920, their actual flying time being forty-five hours twenty minutes, as compared with a rail journey occupying 132 hours. Canadian air services have been well supported by business men, and up to September, 1920, thirty private aviation companies had been formed. More than 15,000 passengers were carried in that year.



CHAPTER IV

THE CANADIAN MARKET BY PROVINCES

THAT portion of the Dominion of Canada washed by the waters of the Atlantic Ocean and lying south of the Gulf of St. Lawrence comprises the "Maritime Provinces" of Nova Scotia, New Brunswick and Prince Edward Island, and should be a fruitful market for British goods in view of the steady prosperity of its people and the comparative nearness of the principal business centres to the ports of Halifax, Sydney and St. John, at which the manufactured products of the Mother Country can be landed.

NOVA SCOTIA which has an area of 21,068 square miles and a population considerably in excess of 500,000, is predominantly a MINING country which is likely to undergo important developments, particularly in iron and steel manufacture, now that its principal industrial concerns have been amalgamated, with assistance from British capital, as the British Empire Steel Corporation. The mineral production of the Province in 1920 was worth \$30,187,533, mainly represented by the output of coal, coke and their by-products, the coal production alone reaching 6,395,545 tons. Iron ore is found in the north and west, but the iron and steel industry of the Province is mainly based on high-grade ore brought to the smelters from the Wabana mines in Newfoundland, which are owned by the Nova Scotia steel companies. Other minerals exploited in Nova Scotia are gold (the goldfields of the Province cover an area of approximately 3,500 square miles), gypsum (in beds of pure quality, frequently

100 feet thick), manganese of high grade, antimony, copper and lead, and oil-shales, and the value of the industry to the Province, inclusive of the manufactures associated therewith, must be considerably in excess of \$50,000,000.

Nova Scotia's second most important industry is AGRICULTURE, her farm products having been worth in 1920 some \$55,000,000, the chief items included in this total being hay, potatoes and apples. The moist climate of the famous Annapolis Valley is particularly favourable to apple-growing, and the Province has a large export market in this important fruit, the 1921 production of which reached some 2,000,000 barrels. Nova Scotia live stock production gains much from the watchful care of the Provincial Department of Agriculture in co-operation with the farmers' organisations, as pure-bred animals are periodically imported into the country by these authorities with the object of improving the breed. The average annual wool clip is 1,000,000 lb., and is of a very fine quality. Dairying and poultry-farming are becoming of increasing importance, particularly from the point of view of export trade.

The third industry of Nova Scotia is LUMBERING, the chief varieties of wood produced being spruce, fir, hemlock, pine, birch, oak and maple. The total value of the forest production in 1919 was \$16,965,000. About 200,000,000 board feet are exported yearly to the United States, the West Indies and Europe.

The sea FISHERIES of this Province are obviously an important source of buying power for its people, the estimated value of the catch in 1919, together with its products, being \$14,350,000.

Nova Scotia's MANUFACTURING industries are not unimportant, and the Province produced in 1918 factory products worth some \$160,409,890, there being 2,125 plants capitalised at \$133,262,649, and employing some 29,036 persons, whose salaries or wages amounted in all to \$24,814,229. The chief manufactured articles

turned out are steam engines and iron and leets machinery, steel and wooden ships, agricultural implements, pulp and paper, rope, textiles, refined sugar, cod oil, canned fish and lobster and dairy produce. Nova Scotia has at the port of Halifax an important steel shipbuilding plant now forming a subsidiary of the British Empire Steel Corporation, which has turned out some fine vessels for the Canadian Government Merchant Marine. The resources of this Province in coal, and the development of its water powers for electrical energy, are certain to lead to industrial progress on an important scale, especially in view of the fact that the Province is in close touch with the markets of Europe, the West Indies, British India, South Africa, and South America.

The port of Halifax, which has a population of some 60,000, is one of the principal terminals of the Canadian National Railways, and is often spoken of as "the world's third greatest port" in view of the large number of arrivals and departures at its beautiful harbour. Halifax is the port of call of many of the largest vessels in the Atlantic services, including some of those on the New York route. The harbour is one of the finest in the world, being open all the year round, and some \$30,000,000 have been spent by the Canadian Government on the improvement of its facilities, berthing accommodation being available for twenty-seven Atlantic liners. Railway facilities are provided by the Canadian National system, which is the predominant transportation organisation in Nova Scotia, and has at Halifax a terminal yard a mile and a half long for some 1,600 box cars of the large North American type, the docks and terminals together covering some 200 acres. The city is of course an important business centre, its bank clearings in 1920 reaching \$254,677,402. Imports through the port in 1920-1921 were worth \$24,749,731, and exports more than \$35,885,394. Among the industries of the city, whose manufactured products in 1919 were worth

\$31,500,000, are the Dominion's largest sugar refinery, a large plant for refining oil, and the Halifax shipyards.

Another business centre in Nova Scotia is Sydney (25,000 in population), which is the commercial centre of a district now making very rapid strides owing to the development of the iron and steel industry under the management of the Dominion Steel Corporation, whose works and those of the associated Dominion Coal Company are situated in the neighbourhood (the latter at Glace Bay). Sydney and North Sydney have a port of growing importance in the North Atlantic trade, and shipbuilding and fishing are also carried on; and at Sydney mines there are the steel plant and the collieries of the Nova Scotia Steel and Coal Company, the capacity for steel production being 100,000 tons annually. Amherst (10,000) is another growing place, the centre of a good farming country and a considerable manufacturing town, dependent upon electrical energy derived from the neighbouring coal mines at Springhill at a comparatively low cost. New Glasgow is the headquarters of the iron foundry, car-manufacturing and steel shipbuilding industries of the Nova Scotia Steel and Coal Company, and is situated in one of the largest and best-developed coal areas in Canada, there being at Stellarton a seam 37 feet thick, the largest in the world. What is called "The Five Town District," comprising Pictou, Westville, Stellarton, New Glasgow and Trenton, is a distinctively industrial centre, which is likely to undergo considerable expansion in the near future with the development of coal-mining in the neighbourhood and the transmission to the factories of hydro-electric energy from the Sheet Harbour rivers. The port of Yarmouth has important fisheries and textile industries; and other notable business centres in the Province are Truro, Windsor, Lunenburg and Liverpool.

PRINCE EDWARD ISLAND, the smallest but at the same time the most thickly populated Province of

Canada, having 88,536 people resident in an area of 2,184 square miles, is a rich AGRICULTURAL country with over 14,000 farms, some 80 per cent. of its population being engaged in rural pursuits. The field crops of the Province have an annual value in excess of \$20,000,000, and consist mainly of hay and clover and of potatoes. The light red loam of the island produces excellent pasturage, which accounts for the prime condition of the live stock. Cattle in 1919 numbered 125,477 head, and sheep 114,955. Poultry-farming is carried on, and some 3,250,000 dozens of eggs were sold by the producers in 1919. The co-operative marketing of agricultural produce, which obtains to so great an extent in Prince Edward Island, has brought about a rapid development in the dairying industries, and in 1919 the value of factory products alone in butter and cheese was over \$1,000,000.

The second source of wealth to the people of Prince Edward Island is the sea FISHERY, from which a catch worth \$1,500,000 is taken annually, consisting of lobster, codfish, mackerel, herring, smelt, hake, oysters and clams. The annual pack of lobsters amounts to approximately 2,500,000 lb., and the famous Malpeque oysters caught here average annually 4,000 barrels.

A third and important source of revenue in this Province is the production of FUR, mainly from foxes maintained in captivity, the returns from which business in 1919 reached \$1,500,000. There were in 1920 some 11,000 pairs of black foxes on the island, and the total value of the industry is estimated to amount to \$10,000,000.

The annual value of MANUFACTURES in the Province is about \$5,000,000, mainly foodstuffs, and the total exports of Prince Edward Island are approximately \$12,000,000 annually.

The island is reached by steamers running in conjunction with the Canadian National Railway system, and direct connections with both Montreal and European ports are afforded by the Canadian Government

Merchant Marine. Business centres are Charlottetown and Summerside.

NEW BRUNSWICK, one of the oldest and richest Provinces of Canada, has an area of 27,911 square miles and a population of 388,092 (1921) in a territory nearly as large as Ireland. Its main industries are agriculture, lumbering and fishing, and in 1920 the total value of all FIELD CROPS produced in this Province was \$46,357,300, consisting chiefly of oats, turnips, potatoes and hay. The climate of New Brunswick is particularly adapted to the cultivation of root crops, the annual yield of potatoes in particular approximating 10,000,000 bushels. Horticulture, especially the growing of apples and strawberries, is coming into prominence as a paying industry, owing to the marketing of the apple crop by a co-operative system and the increasing demand for New Brunswick strawberries, which ripen later than those of Ontario, Quebec, and some of the neighbouring American States.

LIVE STOCK in New Brunswick in 1920 was valued at \$31,188,000, there being 76,737 horses, 147,760 milch cows, 185,228 other cattle, 280,090 sheep and 92,925 swine. Under the auspices of the Provincial Government, pure-bred stock is periodically imported, especially in the case of milch cows and sheep, and the marked success of the central creameries and cheese factories, producing in 1919 butter worth \$504,602 and cheese valued at \$347,772, has led to greater attention being paid to dairying in the Province. Sheep-raising is on the increase, both for general farming and for extensive holdings in rolling country not profitable for crop cultivation. Bee-keeping is another important industry, and \$75,000 worth of honey was produced in New Brunswick in 1919.

The **LUMBERING** industry is of great importance, there being in New Brunswick some 9,000,000 acres covered with timber, consisting of spruce, pine and hardwood. The output of lumber in 1919 was worth \$26,713,403, including pulpwood for the manufacture

of paper, which has important possibilities in this Province.

The SEA FISHERIES of New Brunswick employ some 20,000 people, and their catch in 1919 was worth nearly \$5,000,000, consisting chiefly of "sardines" (young herring), lobster and cod. The inland fisheries produce a fine catch of trout, salmon, pickerel and bass.

The MINING industries of New Brunswick are not yet so important as in other Canadian Provinces, though their output in 1920 reached \$2,225,261, consisting mainly of coal. The coalfields cover 112 square miles, and are estimated to contain over 150,000,000 tons of bituminous coal, the 1920 production, however, only reaching 161,164 tons. A certain amount of iron and copper is at present mined, as well as antimony and oil shales, and there are also available for exploitation natural gas, building stone, gypsum and clay.

The total value of the MANUFACTURES of New Brunswick in 1918 reached \$68,333,069, these products being turned out in 1,364 establishments, employing 19,888 persons at wages and salaries totalling \$14,247,388. The principal articles manufactured are lumber, pulp and paper, furniture, cotton and woollen textiles, boots and shoes, canned fish and lobster, and dairy products. New Brunswick's exports are mainly canned fish and wood products.

The Province is fortunate in its possession of water powers capable of being developed up to 100,000 H.P., but as yet only about 18,080 H.P. has been installed. The New Brunswick Power Commission, formed in 1918, has been engaged on investigations as the results of which three projects in the district of St. John, totalling 8,000 H.P., 12,000 H.P., and 15,000 H.P., respectively, are considered feasible, and construction work on the former scheme—on the Musquash River—has already been begun, work being also in progress in other parts of the Province.

New Brunswick is a country of great navigable rivers and is well served by railways, there being some 3,000

miles of line within the boundaries of the Province, the Canadian National system having connections with all the important business centres, and being the main connecting link with points in Nova Scotia and Quebec respectively.

From the port of St. John, an important distributing point for the Maritime Provinces, flows out during the winter season the main stream of the traffic borne by the Canadian Pacific Railway, and to European ports by the C.P.O.S.; and the Canadian Government Merchant Marine has connections with the West Indies and other markets. St. John is also a winter or summer port for other services between Canada and the United Kingdom, Continental Europe, South Africa, Australia, India, and the United States. No fewer than fourteen lines of ocean steamships use this port as their winter terminus, and there are three large grain elevators, each of 1,000,000 bushels capacity. Extensions of an elaborate character have been carried out in the harbour in order to provide accommodation for the largest ocean steamers afloat, the works including a ship repair plant and a dry dock 1,150 feet in length, the largest in the world. St. John is reached not only by the main line of the C.P.R., through the State of Maine, but by the C.N.R. line from Quebec *viâ* Moncton, and its total import and export trade in 1920-1921 amounted to \$113,995,039, of which total imports represented some \$32,857,033, the port being an important point for the shipment overseas of grain and other agricultural products, as well as of lumber, some 125,000,000 feet of which are floated down the St. John River to the port annually. The forthcoming hydro-electric developments in the neighbourhood of the city of St. John, which has now a population of about 60,000, should bring about a considerable growth in its industrial as well as its transportation business.

Apart from St. John, New Brunswick's principal business centres are perhaps Bathurst, a considerable lumbering and pulp-manufacturing place; Fredericton,

the capital of the Province, which has some important saw-mills and wood-working factories, farm implement works, etc.; and Moncton, the second largest city in the Province, whose excellent railway facilities as the junction point of the C.N.R. lines from Halifax, Quebec, Montreal and St. John make it a notable distributing centre. At Moncton are the workshops of the Canadian National Railways (Intercolonial Railway Division), employing some 3,500 workers, and the city has a valuable supply of natural gas from the Albert wells. Newcastle, a small shipbuilding port, St. Stephen, Woodstock and Sussex, are other considerable business centres in the Province, being distributing centres for flourishing farming districts.

Having dealt thus briefly with the Maritime Provinces of Canada, we have to study the vast market presented by **QUEBEC**, Canada's largest Province, which in an area of 690,865 square miles maintains a population of more than 2,240,000, mainly of French stock, though with English-speaking minorities in the large cities and a considerable English-speaking population in what are called the "Eastern Townships" lying south of the River St. Lawrence. The market in this Province obviously presents problems of its own, which must be carefully studied by firms wishing to cater for its large population, consisting of people whose standards differ very much from those of other populations in North America.

The Province derives its buying power chiefly from agricultural and forestry pursuits, and as its manufacture of pulpwood, with plant capitalised at more than \$100,000,000, is greater than that of any other Canadian Province, and is rapidly developing into a main source of supply for the world's markets, **FOREST** products may perhaps be properly specified as the distinctive output of Quebec. There are estimated to be some 145,000,000 acres of standing timber in this Province, consisting of spruce, balsam, fir, white pine

and hardwood, of which the annual cut approximates to 1,000,000,000 board feet, worth in 1919 some \$20,916,604. While hardwood and a certain proportion of the soft varieties are reserved for wood-working purposes, the greater part of the cut is used for the manufacture of pulp and paper, the value of wood pulp produced in 1919 having been \$18,746,479, and that of paper and kindred products another \$32,959,304. The increased demand in the world, and particularly in the United States, for newsprint paper, has brought about phenomenal development in this industry, and progress is still going on rapidly.

AGRICULTURE, in which more than half the population of the Province is engaged, has made great progress in Quebec, especially under the great stimulus provided by the need for foodstuffs revealed during the late war. The total value of the field crops harvested in Quebec in 1920 was \$330,251,000, which is considerably more than three times the production in 1914. Large quantities of hay and oats are grown and exported from the ports of Quebec and Montreal, the annual average cut of hay being about 6,000,000 tons. Wheat growing made progress during the war, and the Province also produces apples, plums, melons and tomatoes; flax is grown for fibre, and tobacco is an increasingly important crop, covering about 33,000 acres, and yielding about 26,000,000 lb. per annum, which is nearly two-thirds of the production of the Dominion.

During the last three years maple sugar manufacture has increased threefold in the Province of Quebec, now amounting annually to 30,000,000 lb., valued at \$7,000,000. This increase has been mainly due to the scarcity of beet and cane sugar, but another important factor has been the establishment of sugar-making schools. In addition, many demonstrations in sugar-making are given in all parts of the Province by special instructors sent out at the expense of the Provincial Department of Agriculture. At the schools, where the students have their board paid by the Department

during the period of residence, the most modern methods of sugar and syrup making are taught.

The raising of LIVE STOCK in Quebec is an important industry, the total value of the herds in 1920 being \$206,814,000, and there were then 433,199 horses (the French-Canadian breed being in good demand in North America); 1,030,809 milch cows and 1,101,403 other cattle, 1,031,882 sheep and 836,431 swine. The keeping of over 1,000,000 milch cows obviously represents a considerable dairying industry, whose factory products in 1919 were worth some \$36,784,570. As in other Canadian Provinces, this industry is worked largely on co-operative lines, and there are in Quebec some 631 creameries, 833 cheese factories, and 403 combined plants, or 1,868 in all, turning out products of high quality for which there is a valuable export market in the United Kingdom and elsewhere.

The MINING industry of Quebec is capable of enormous expansion, as this Province, with its great area of almost unexplored territory, has notable mineral resources the extent of which is very vaguely estimated. The production of minerals in 1920 was worth \$27,722,502, and it may be mentioned that Quebec is the largest storehouse of asbestos in the world, its output being about \$10,000,000 annually, or 80 per cent. of the world consumption. Other minerals exploited at present are copper, iron, gold, silver, graphite, molybdenite, mica and building stone.

Quebec's FISHERIES, inland and deep water together, were worth in 1919 some \$4,258,731, and the Province is, of course, an important centre of the fur industry, both trapping and farming.

In the Province of Quebec, the Provincial Streams Commission has for some years pursued an enterprising and far-seeing policy of WATER-POWER development by constructing storage reservoirs in the principal watersheds for the improvement of rivers, while leaving the development of power to private concerns. The great size and successful results of the St. Maurice and St.

François reservoirs are well known in the electrical world, the Gouin dam at the head of the first-named stream being the second biggest in the world, with a capacity twice that of the famous Assouan dam on the Nile.* Out of an available water power estimated to reach 8,000,000 H.P., there are already installed about 1,000,000 H.P., and there are important developments now in progress in many parts of the Province, corporations like the Shawinigan Power Company, the Laurentide Company, the Southern Canada Power Company, and others being largely responsible for the development of manufacturing and other industries in the numerous growing towns served by cheap power from the great falls in the Province of Quebec. The total new power development work in hand during 1920 was probably not less than 140,000 H.P., and a number of new projects are under consideration which will exercise a notable influence on the economic progress of Quebec during the next few years, and on hydro-electric power, in the absence of locally produced coal, very largely depend the growing manufacturing industries of the Province.

The MANUFACTURES carried on in Quebec are numerous, the value of the products turned out in 1918 being \$920,621,171. The 10,540 plants engaged in manufacturing in that year were capitalised at \$860,468,768, and employed 270,513 persons on wages or salaries aggregating \$175,799,985. The French-Canadian workers have earned a great reputation, particularly since the war, for their reliability and their aversion

* The Gouin (La Loutre) dam on the upper waters of the St. Maurice River, Quebec, has a storage capacity of 160,000,000,000 cubic feet and a water area of 300 square miles, forming the second largest storage reservoir in the world. It is exceeded in size only by that of Gatun Lake on the Panama Canal. The storage at Gouin will permit a regulated permanent flow of over 12,000 cubic feet per second at Shawinigan, rendering 1,000,000 H.P. now available on the St. Maurice.

Another source of energy at present undeveloped is situated at Grande Décharge, Lake St. John, where 800,000 H.P. could be harnessed for manufacturing purposes.

to strikes, due largely to the deep religious feeling and general *bon sens* of the people of this Province. The chief manufactured products are pulp and paper, furniture, machinery and farm implements, railway cars, ships and boats, cotton, woollen, flax and silk textiles, knitted goods, boots and shoes, leather, asbestos products, Portland cement, chemicals, tobacco, refined sugar, flour and dairy products.

The Province of Quebec has nearly 4,500 miles of steam railway and almost 1,000 miles of electric lines, and in addition to nearly 3,000 miles of road between farms and market centres there are more than 350 miles of first-class motor highway. The Canadian National and Canadian Pacific Railways have connections with all the important business centres, including the great ports of Montreal and Quebec.

The principal BUSINESS CENTRE in the Province is of course the great city and port of MONTREAL, which has a population of about 713,000, and is the second most important port on the American continent, although first in point of shipments of grain, for which it has unique facilities both for storage and loading, there being also up-to-date refrigerator accommodation with insulated conveyors for loading ships. The port is one of the best equipped in the world, with eight miles of deep water in the harbour and wharfage room for 125 vessels, on ten miles of water front. Some \$30,000,000 has been spent on the equipment of the harbour, and in 1919 the number of large steamers arriving there was 786, of which 702 were trans-Atlantic liners. The total tonnage of shipping registered at the port in 1920 was 6,319,445. During the year 460 vessels flying the British flag entered the port, also 120 American, 41 Italian, 2 Norwegian, 6 French, 6 Greek, 2 Dutch, 2 Spanish, 1 Russian, 1 Belgian, 1 Iclander, 1 Swedish and 1 Japanese. Imports through the port in 1920-1921 were worth \$286,597,463, exports reaching a total value of \$262,857,600. Montreal is the terminal point of the great inland waterway system of North

America, leading for a distance of over 1,000 miles from the Atlantic Ocean to the centre of the continent, and in the port transshipment takes place from ocean vessels to lake steamers bound for Toronto, Hamilton, Buffalo, Chicago, Port Arthur, etc. Some of the vessels of the Canadian Government Merchant Marine and of the Canada Steamship Lines, Ltd., are able to proceed straight from the Atlantic to the head of the Lakes without the delay and expense of transshipment, and the development now under consideration of the 1,000-mile through route to the Middle West to be obtained by the deepening of the canals at present in existence is certain to add considerably to the bulk of goods passing through Montreal in this way *en route* for the great inland ports already mentioned. In addition to her important shipping trade, however, Montreal has of course a large local distributive trade to a population in excess of 1,100,000. Her bank clearings in 1920 reached the formidable total of \$7,109,189,038. Montreal is, of course, one of the greatest manufacturing centres in North America, and, though Toronto runs her very close, has a production greater than that of any other Canadian city, reaching \$506,429,283 in 1918 in her 2,375 plants. The manufacturing industries of Montreal were capitalised in 1918 at \$468,401,480, and employed 157,878 persons at wages or salaries aggregating \$110,196,219. The city has hydro-electric power in abundance from the Shawinigan Falls, Lachine Rapids and the rapids at Chambly, and its industries include the manufacture of boots and shoes, clothing, sugar refining, flour milling, cement, tobacco, rubber, iron and steel, machinery, tools, silk, cotton and woollen textiles, paints, furniture, carriages, electrical goods, confectionery, etc., there being also important shipbuilding yards.

Montreal is the terminal of the principal railway systems of Canada, being connected by the Canadian Pacific and Canadian National Railways with the cities of Halifax and St. John, Quebec, Toronto, Hamilton,

Winnipeg, Regina, Calgary, Edmonton and Vancouver, and with most of the other important Canadian business centres.

The second city of importance in the Province is its seat of government, QUEBEC, which has a population of 120,000, and is situated down the St. Lawrence, 180 miles nearer to Liverpool than Montreal, being the landing-place of most of the emigrant traffic reaching Canada in the summer months. The harbour affords wharfage accommodation for thirty ocean-going vessels in addition to numerous smaller craft, and is supplied with electrical equipment for loading and unloading freight. Quebec has several graving docks, one of which is 1,150 feet long by 120 feet wide, capable of taking the largest vessels, with repair shops in connection therewith. Imports landed at Quebec during the year 1920-1921 were worth \$26,663,862, and the export trade dealt with there during the same period reached a total value of \$28,588,233. The port is served by both of the great Canadian railway systems, being on the main line of the Canadian National Railways from Halifax to Winnipeg (National Transcontinental), there being also direct connection with Montreal both on the north and south sides of the river. The Quebec Bridge, which connects the city with the C.N.R. lines south of the river, is one of the greatest engineering works in the world, having the longest span (1,800 feet) of any bridge in existence, the centre portion weighing some 5,000 tons and being 150 feet above high water. The total length of the structure is 3,240 feet.

The city of Quebec is an important distributing centre for goods, and has many varied and important industries, including twenty tanneries, thirty-three boot and shoe factories, others being wood-working, tobacco, biscuits, preserves, clothing, corsets, furs, cotton textiles, lumber, and wooden and steel shipbuilding, the total number of plants in 1918 having been 424, capitalised at \$35,901,748. These employed 11,160

persons on wages or salaries amounting to \$6,981,436, and produced goods valued at \$32,742,192.

The Province of Quebec is, of course, a predominantly rural community, occupied with lumbering or with agriculture, but the development in recent years of hydro-electric power at cheap rates is bringing about the rise as manufacturing centres of a number of the small cities and towns whose importance has hitherto been mainly in their capacity as distributing points for merchandise. Taking some of these in alphabetical order, mention may be made of Buckingham, lying north of the Ottawa River, the centre of an important pulp and paper, lumber, mica and graphite-mining district ; Chicoutimi, which is an important pulp and paper manufacturing centre of 7,000 people on the Saguenay River and the gateway to a quickly developing agricultural region around Lake St. John, and to an agricultural and lumbering area on the new line to Lake Chibougamau which is now being constructed by a company started by British capitalists and newspaper proprietors, headed by Lord Desborough ; Drummondville, on the St. Francis River, lies in a rich dairying region, in which active lumbering operations are also carried on: the town lies within the sphere of operations of the Southern Canada Power Company, whose total horse-power reaches 150,000, and has growing textile, wood-working and other industries ; Grand' Mère, the centre of operations of the great Laurentide power, pulp and paper concerns, developing already some 180,000 H.P. for its own purposes and for distribution to neighbouring industries, is on the St. Maurice River, fifty-five miles from Montreal ; Hull, opposite to the city of Ottawa, an important lumber and wood-working centre, with other manufactures, its industrial output in 1918 having reached \$15,139,468 ; Joliette, a small but growing manufacturing town some forty miles from Montreal, noted for its paper mills, iron and steel industries, clothing and yarn factories, lumber mills tobacco, confectionery

and other plants, dependent on hydro-electric power from the Shawinigan Falls ; Levis, opposite to Quebec city, on the south shore of the St. Lawrence, has important shipbuilding yards, foundries, planing mills, machine shops, etc. ; St. Hyacinthe, another manufacturing centre dependent upon the Southern Canada Power Company's hydro-electric system, its industries including the manufacture of boots and shoes, spinning wheels, organs, farm implements, flour, corsets, biscuits, hosiery, gloves, leather, etc. ; St. John's, which has also many growing industries dependent upon hydro-electric power, including sewing machines, silk, clothing, planing mills, machinery, etc. ; St. Lambert, where are manufactured textiles, bricks, pottery, lumber, electrical goods, etc. ; Shawinigan Falls, with its vast electro-chemical industries, pulp and paper mills, etc., dependent on the 200,000 H.P. already developed at the local falls, a growing town with great possibilities, which in 1917 produced 26,000,000 lb. of aluminium, which has a pulp and paper plant producing 255 tons of pulp and finishing 200 tons of paper daily in 1920, a carbide plant producing 200 tons per day, and linked to other manufacturing centres by 1,300 miles of high-tension transmission wires, carrying to Montreal alone, 100 miles away, 60,000 H.P. ; Sherbrooke, where the Great Eastern Exhibition is held annually every September, an important manufacturing city, whose 129 plants turned out products worth nearly \$20,000,000 in 1918, including woollens, cottons, silk gloves, hosiery and underwear, boots, automobile tyre fabric, jewellery, mining tools, paper, machinery, engines and boilers, rubber goods, cigars, etc.: the city is the principal business centre in the Eastern Townships, being situated in a rich farming and dairying country, the principal asbestos mines also being in the vicinity ; Three Rivers, an important pulp and paper, lumber, iron and steel foundry, machinery, boots and shoes, and textile manufacturing centre, the distributing point of an agricultural district of 500,000 people ; Valleyfield, with cotton, flour, machinery, and other

factories; Victoriaville, with furniture and other industries; many of the smaller towns having also good prospects of expansion in view of the abundance of industrial power and cheap, steady labour available in the French-speaking Province of Canada.

The Province of **ONTARIO**, though more than any other Canadian Province devoted to the manufacture of finished products as well as to the working up of raw materials for use in industries elsewhere, is nevertheless one of the most promising spheres of activity for British exporters, in view of the steadfastly "British" character of its people and of their great buying power for every description of goods. Ontario, an immense country covering 365,880 square miles, has a population in excess of that of any other Province of Canada, amounting to about 2,900,000 persons, and natural resources, known and unknown, of enormous value. The principal occupations of the large rural population of the Province are agriculture, lumbering and mining, agriculture being carried on under approximately the same conditions as in the United Kingdom, as on the 14,000,000 acres under cultivation the size of the average farm is estimated at 140 acres, with an average value of \$9,700, and raising a variety of products rather than devoting the energies of the farmer mainly to grain growing, as is still the case in some parts of Western Canada. The **FIELD CROPS** produced in Ontario in 1920 reached a total value of \$396,183,000, the area sown to grain alone in that year having been over 10,000,000 acres. These crops consisted, in order of importance, of oats, turnips, autumn and spring wheat, potatoes, barley and sugar beets, and Ontario is also an important centre of the tobacco-growing industry of Canada, particularly the counties in the south-western corner of the Province, and the annual production is now about 20,000,000 lb. Ontario is an important producer of flax fibre, the quality being as high as any in the world. Over 30,000 acres were under this crop in 1920,

and more than forty mills are already in operation, the business being partly under the control of a Canadian concern—Canadian Flax Mills, Ltd.—and partly in the hands of Belfast mills with which Ontario flax fibre has a very high reputation. The yield per acre on well-cultivated soil is as high as 500 lb. of fibre and between 12 and 15 bushels of seed, and while much of the fibre is at present exported, steps are being taken to develop the manufacture of all descriptions of linen goods in Canada in order to find a domestic outlet for the much larger production which is held to be justified owing to the excellence of the quality of the Canadian fibre. The invention and perfection during 1920 of the Vessot flax-pulling machine is of great moment to this industry, as it removes the principal obstacle—the lack of cheap labour—to the expansion of production in the Province. The climate of Southern Ontario is favourable to the cultivation of every variety of food plant known in the temperate zone, and all fruits (including luscious peaches and grapes) are grown, particularly in the Niagara district, the production of which locality is limited only by the supply of labour to be had in the picking season. The average annual yield of fruit in Ontario is worth some \$20,000,000, including apples valued at \$12,500,000, peaches, grapes, pears, plums, cherries and small fruits, all of which are in great demand throughout Central Canada, and particularly in the Prairie Provinces, there being also a considerable export trade in apples and peaches to the United Kingdom and elsewhere. Agriculture in Ontario is carried on under many advantages, particular mention being made of the access by most farmers to cheap electrical power for numerous purposes, radial electric railways for the transportation to market of agricultural produce, co-operative markets, good motor roads; and the farmers of Ontario will always have a good market close at hand for their produce, rendering them steady purchasers of manufactured goods of every description which may be brought to their attention by advertising, or through

the mail order houses by which so large a proportion of the trade is carried on. The production of silk is now being inaugurated in Ontario, and a model orchard of Osigion silk trees, comprising some 20 acres, will be planted just north of Simcoe, Ontario, by the Osigion Silk Company. A nursery will be established and works will be in operation as soon as the new trees are producing leaves. This is the first district that has taken up silk production in Canada.

The raising of LIVE STOCK of all sorts is of course carried on largely in Ontario, the total value of farm stock in 1920 having been some \$332,194,000, including 704,640 horses, 1,170,010 milch cows, 1,711,817 other cattle, 1,128,084 sheep, and 1,614,356 swine, poultry kept being worth \$15,000,000. The value of live stock marketed in the Province annually is little less than \$150,000,000, the Toronto cattle markets handling large numbers for export or slaughter. The breed of Ontario stock is remarkably pure, and cattle produced here are in demand for the improvement of herds in the newer Provinces of Canada, as well as in the United States. Ontario hogs, fed on dairy by-products and flourmill offals and bred largely from imported English stock, supply a much finer bacon than can be obtained from corn-fed animals, and this is steadily growing in favour in the English market. The yearly output from five Toronto pork-packing and bacon-curing establishments alone is estimated to have a value of \$60,000,000. The large number of milch cows maintained in Ontario obviously indicates much interest in dairying, and the Province is of course an important home of cheese and butter manufacture, about one-half of the Canadian production of cheese being made in Ontario, particularly in the neighbourhood of Belleville and Brockville. The 1919 output of dairy produce in Ontario reached a total value of about \$100,000,000, 388 cheese factories having an output worth \$28,000,000 and 179 creameries producing butter valued at \$20,000,000. Condensed and powdered milk accounted for \$11,000,000,

and there was also a large production for direct consumption as milk, etc.

The second most important industry in Ontario is that concerned with the utilisation of FOREST products, standing timber in the Province including pine, hemlock, spruce and hardwoods, the cut in 1919 being worth \$60,565,554, including pulpwood for paper manufacture, railway ties and structural timber.

Ontario not being a seaboard Province, its FISHERIES, the production of which in 1919 was worth \$3,410,750, lie in the Great Lakes and in the numerous rivers, streams and smaller lakes.

The MINERAL PRODUCTION of Ontario, worth \$78,749,178 in 1920, is a very rough indication of the vast resources of this Province in both metallic and non-metallic ores of every description, as discoveries are constantly being made, particularly in the vast territory lying in the northern portion of the Province and sometimes styled "New Ontario." The total value of the metallic ores raised in Ontario up to 1920 is little less than \$650,000,000, and dividends paid by successful mining companies from this production amount to some \$125,000,000. The mineral resources of the Province include nickel, in which metal Ontario has almost a monopoly of the world supply; copper; silver [since the discovery of the Cobalt Silver Mines in 1903 Ontario has produced over 313,000,000 oz. of silver; during that period the price of the metal has fluctuated from 51 cents per ounce to the record price of 137 cents an ounce (in January, 1920)]; gold; and iron; as well as graphite, petroleum, natural gas, and structural materials of various descriptions. Ontario's iron resources are very extensive, though far from being developed to the extent which might seem justified when the importance of the Canadian iron and steel industry is considered. In Eastern Ontario, chiefly in the counties of Hastings, Frontenac and Renfrew, are enormous deposits of low grade hematites and magnetites, the development of which has been arrested

by the competition of high-grade imported ores from the south shore of Lake Superior, but which seems now to be ripe for resumption in view of the approaching exhaustion of the Minnesota ranges and the invention of new methods of smelting which utilise in combination the advantages of coal- or oil-produced heat and hydro-electric energy, the latter in the finishing processes. Water power is abundant in the neighbourhood, and there is little doubt that before long, with some assistance perhaps from Governmental authorities in the first stages, an important iron and steel industry will arise in the neighbourhood of Belleville. At the present time, however, although high-grade iron is believed to be available in considerable quantities in the Cobalt district and about fifty other separate occurrences of iron ore are recorded in other parts of Northern and Western Ontario, the principal activity in the Province is in "New Ontario," at the Helen and Magpie mines, near Michipicoton, north-west of Sault Ste. Marie, where the smelter of the Algoma Steel Corporation is situated. A discovery of a large body of high grade hematite iron ore in the Elk Lake district of Northern Ontario has been reported. Iron was not expected to be found in paying quantities in that district. Much of the iron ore in the great range of which the Atikokan and Moose Mountain deposits are a part is of 50 per cent. metallic content, but contains other elements that render necessary special blast furnace treatment. The news of the rediscovery of a great deposit of hematite iron ore 100 miles from Sault Ste. Marie by Colonel J. A. Currie, ex-M.P. for North Simcoe, and Mr. Archibald M. Campbell, a well-known Canadian geologist, has aroused a good deal of interest throughout mining circles and in the northern part of the country generally. Iron has for a long time been mined at Moose Mountain, twenty miles north of Sudbury, shipments being made over the Canadian National Railway system through Key Harbour, on Georgian Bay. The enormous importation in recent years from the United States of iron ores, pig

iron and iron and steel manufactures of various descriptions, with its inevitable effect on the exchange situation, has given rise to much interest in the possibility of developing domestic iron resources, and active steps to that end are hardly likely to be much longer delayed. The Provincial Department of Mines is conducting a careful investigation into the possibility of making a commercial success of the treatment of Ontario's low grade iron ores. The Hon. Harry Mills, Minister of the Department, has been looking over some of the plants in Minnesota, where success has been encountered in the treating of ores said to be of lower grade than those in Ontario. Some of the first tests are to be made at Port Arthur. It is felt that the question of a great stimulus to the mineral production of the Province depends upon success. The treatment of these low grade iron ores has often been attempted in Ontario before, but it is claimed that recent discoveries and systematic plans give more hope to the tests now being arranged than was ever the case before.

In the Province of Ontario there are thirteen peat bogs estimated to contain 43,000,000 tons of peat, capable of producing 1,800,000 tons of ammonium sulphate and gas power sufficient to generate 40,000 H.P. continuously for 100 years.

In view of the absence of visible coal resources in the Province, the great heritage of Ontario in her many quick-flowing streams is of notable significance, and the Province has the distinction of possessing, under public control, the largest system in the world for the production and distribution of electrical energy. The hydro-electric power system of Ontario consists of fourteen sub-systems (the principal of which is of course that based on Niagara Falls), distributing current in 264 municipalities, situated all over the Province from the Great Lakes to the Niagara River and from the Ottawa to the Detroit River. It is estimated that the total capital expenditure involved by the end of 1922 will have reached \$212,000,000. With the completion

of the Chippawa-Queenston Power Canal and other projected developments and extensions, the annual output of power will exceed 1,000,000 H.P., representing a vast economy in imported coal. Undertaken by the Hydro-electric Power Commission of Ontario in order to make the most economic use of the 36,000 cubic feet per second of Niagara River water allowed to Canada by the International Treaty for hydraulic purposes, the Chippawa-Queenston Power Canal diverts water from the river twelve miles farther south than the existing plants and about two miles above the Falls. For four and a half miles it follows the dredged bed of the Welland River, actually reversing the flow of that slow stream, and is then carried across country by means of a canal, which in some places is 1,000 feet wide. This is the greatest engineering work in the world since the construction of the Panama Canal, and at the generating plant itself, situated at Queenston, with a head of 305 feet, there will ultimately be fitted nine units, each of 52,500 H.P., the largest yet constructed anywhere. Including the 150,000 H.P. available in December, 1921, with the complete equipment installed the plant will be capable of generating 525,000 H.P., at a total construction cost of approximately \$55,000,000. The construction of this new Chippawa plant is making it possible for the Power Commission to undertake the erection of new transmission lines into the rural districts of the Province on a scale hitherto unexampled owing to the excess of demand over supply during the war-time growth of manufactures in Ontario. The Government estimates, after an investigation covering 23,000 farms, that at least 10,000 will instal electricity for lighting and power purposes as soon as the necessary transmission lines are provided, and it is their intention to construct at least 1,000 miles of these lines during the five years ending 1925. British firms should need no reminder that the completion of such a project will produce an active demand in Ontario for lighting appliances, motors, meters, and electrically driven farm

machinery of all kinds. Another undertaking under consideration is the construction of a number of radial railways in the eastern and western parts of the Province at an estimated cost of \$50,000,000.

The possession of cheap electrical energy is obviously of great moment in the creation of MANUFACTURING industries, and it is notable that even in 1918 Ontario had in operation some 15,365 plants, capitalised in all at \$1,508,011,435, and producing in that year goods worth \$1,809,067,001, or twice the output of the Province of Quebec for the same period, and far in advance of any other Canadian Province. The employees in these factories numbered 333,936, and drew in wages or salaries some \$321,160,214. The chief products of these industries were pulp and paper, furniture and furnishings, textiles, rubber and leather goods, clay and cement products, iron and steel foundry and machine shop products of all kinds (including carriages, agricultural implements and automobiles), musical instruments and foodstuffs, including both cereal and animal products. Ontario is the centre of the Canadian automobile industry. From this Province there is an important and growing export trade in lumber (white and red pine, spruce and birch), apples, prime lean bacon and cheese, to Great Britain, pulpwood, pulp and paper, automobiles, live stock, and many lines of finished manufactured goods. The various cities and towns in the Province enter into vigorous competition one with another to offer advantages to British or American firms to establish branch factories in their localities, these facilities including free sites, tax exemption, etc. ; and firms in the United Kingdom would do well to consider whether the Canadian market of nearly 9,000,000 people does not justify the expenditure of a certain amount of capital for the provision at least of assembling plants to take care of business obtainable by them in the Dominion. Such plants might either be owned and operated by one firm itself or in co-operation with other British firms producing non-competing

products, and even if they supplied only a portion of the market, leaving the balance of orders to be filled from home, they would be a valuable nucleus from which a larger industry would grow as the market tended to develop and the goods became popular in the Dominion. The sale of mechanical products of British manufacture is immensely facilitated if purchasers can be guaranteed delivery of spare parts and renewals without the necessity of awaiting shipment from Great Britain, and orders are often lost in the absence of such a guarantee by the salesman.

The Province of Ontario has, of course, ample means of WATER TRANSPORTATION in its lakes, rivers and canals, the system provided by the Great Lakes and the St. Lawrence River forming a waterway from Port Arthur to Montreal 1,223 miles in length. The Provincial highways are in progress of improvement and extension, and there were even in 1920 nearly 2,000 miles of improved roads. Railways extend throughout the length and breadth of the Province, the lines covering 11,057 miles.

The principal business centre in Ontario is its capital city, TORONTO, which has a population of nearly 600,000, being the twelfth city on the North American continent. The city has an important port on Lake Ontario, which is destined to grow in importance with the development of direct shipments from ocean to inland ports foreshadowed in Chapter III., and its imports in 1920-1921 were worth \$242,909,783, by rail or water. In connection with the development of Toronto harbour, on which some \$25,000,000 is being spent by the municipal authorities, 1,000 acres of waste land are being reclaimed adjacent to and on the harbour front, the centre of which is approximately one and a half miles from the business centre of the city. This land is to be disposed of by the Harbour Commission as sites for industrial plants, as well as for parks and recreation areas, and factories built thereon will have conveniently arranged connections with both trans-

continental railway systems, there being also provided a ship canal a mile and a quarter long and 400 feet wide running through the centre of the new industrial district. In order that Toronto should benefit to its fullest extent by this improved navigation and be prepared to accommodate the ocean carriers which may in a few years be trading to ports on the Great Lakes, the Commissioners in their development are providing every modern facility for the economic and rapid unloading and loading of vessel cargoes both in the industrial districts and along the commercial water front of the inner harbour, together with adequate accommodation for passengers and the co-ordination of rail and water traffic, all of which will be completed and in readiness to take care of the first big ocean vessel to navigate the St. Lawrence deep waterways. In short, Toronto harbour will have accommodation for upwards of 100 vessels ranging from 5,000 tons to 8,000 tons, with the equipment necessary to complete their unloading within twenty-four hours from the time of docking. Toronto is, of course, the distributing centre for a large area, its bank clearings in 1920 having reached \$5,410,204,802. It has one of the principal live stock markets in Canada, the value of animals dealt with there in 1919 having amounted to nearly \$70,000,000, whilst the output of the important meat-packing industry centred in the city was nearly \$100,000,000. Toronto is second only to Montreal in the number of its banking institutions, no fewer than eight of the Dominion's eighteen chartered banks, with paid-up capital amounting to \$50,000,000 and reserves reaching nearly \$60,000,000, having their head offices there. Toronto is not only the educational centre of the Province of Ontario, its university, a splendidly equipped institution with 5,000 students, being one of the two greatest in Canada, but is a prominent literary centre, with many publishing houses issuing Canadian literature and magazines of a national character, most of the larger trade

journals published in Canada having their head offices in Toronto.

The city of Toronto is a very large user of hydro-electric power for industrial and other purposes, and its manufactures include practically every line which is at present produced in Canada, there being in 1918 some 2,835 plants, capitalised then at \$392,945,178, and employing 106,128 persons at wages or salaries amounting to \$105,509,698. The value of the products turned out during the twelve months was \$506,429,283, the manufactures carried on in Toronto being, as compared with those of Montreal, probably more among the light finishing industries than the working up of staple commodities. Toronto's largest industry is that devoted to the manufacture of clothing, including hats, gloves and furs, there being more than 200 factories engaged on this work. Next in importance is the metal industry, including plants producing engines, boilers, machinery, implements, tools, and other metal goods, in which business another 200 factories are at work. The chemical industry, which is one of steadily increasing importance in Canada, is represented in Toronto by about fifty plants, and eighty large plants are concerned with the printing and allied trades, including book publishing, etc. The manufacture of stationery and paper goods of all kinds is conducted in sixty establishments. The jewellery industry, including the manufacture of watch cases, gold and silver ware, is quite extensive, there being no fewer than forty plants at work ; and musical instruments, including pianofortes, piano actions, phonographs, band instruments, etc., are also made in Toronto on a large scale in some twenty-six factories. There are forty-five plants engaged in the lumber and woodenware industry, thirty-nine in the furniture and house-furnishing industry, thirty-two in the brick and building material industry, twenty-six in the harness and leather goods industry, twenty-four in the ice-cream and confectionery industry, sixteen in the boot

and shoe industry, eleven in the rubber industry, eleven in the flour and cereal industry, and ten engaged in bread and biscuit manufacture. Thirty plants in Toronto produce electrical goods of various sorts; twenty plants make grocers' sundries; as many as fifteen plants are engaged on glass and glassware; fourteen make paint, oils and varnish; nine are manufacturing carriages and wagons, eight making soap, seven making aerated waters and allied lines, five making cigars and tobaccos; and there are nine meat-packing houses.

The Canadian National Exhibition, held annually at Toronto, is an important function which attracts over 1,000,000 persons during two weeks of September of each year. Visitors come from every part of Canada and the United States, and in some ways it is the most important permanent exhibition in North America. While, however, a few British firms have learned the value of this exhibition and habitually exhibit goods there, its very existence is unknown to others who are making efforts to do business in the Dominion, and the recent decision of the Federation of British Industries to open a stall there is a welcome move in the direction of securing a more adequate representation of British manufactures in a market which is growing more and more sympathetic to those British goods the competition with which is foreign rather than domestic, as well as quick to appreciate the traditional high quality of goods turned out in the Motherland.

Following Toronto, the cities of Hamilton and Ottawa are probably the most considerable business centres in the Province.

OTTAWA, the capital city of Canada, has a population of nearly 110,000, and is an important centre of the lumber and wood-working industries associated with the Ottawa River and its tributaries, its importance as a financial and commercial centre being evidenced by its bank clearings, amounting in 1920 to \$515,006,581. Ottawa has 404 industrial plants, whose products in

1918 were worth \$42,282,417, these including, in addition to woodenware and paper, cement, calcium carbide, marine gas buoys, mica products, clothing, etc. Water power within a radius of sixty miles is estimated to amount to 2,000,000 H.P., of which only 75,000 H.P. is at present utilised.

HAMILTON, a city of about the same population as that of Ottawa, is of much greater importance industrially, and it is also the distributing centre of a rich fruit-growing district. It had in 1918 some 685 industrial plants, capitalised at \$142,336,442, and employing 30,944 persons at wages or salaries reaching \$31,901,388. The value of the products of these factories, the number of which has grown considerably since 1918 owing to the continual influx there of branch plants of American manufacturers, was \$188,154,995, so that Hamilton is the third city in Canada as a centre of manufactures, these including a remarkable number of finished products, such as steel, iron, cotton and woollen goods, agricultural machinery and implements, tobacco, electrical wires and cables, clothing, store fixtures, automobiles, trucks, tyres, rubber goods, stoves, elevators, boots, furniture, and many other articles. Hamilton's bank clearings in 1920 amounted to \$380,733,960.

Taking the smaller business centres of this Province from east to west, starting from Montreal, one would enter almost immediately into what is sometimes called the "Yorkshire of Canada," comprising an agricultural district containing a considerable number of small towns and villages predominantly engaged in the woollen yarn, textile or knit goods industries, and including places like Arnprior, Carleton Place, Perth, Renfrew, etc. Further west, in the cheese and butter country, one finds Brockville and Belleville, the principal centres of the dairying industry of this Province, Brockville having in addition many industries concerned with hardware, automobiles and motor trucks, furniture, clothing, etc., and Belleville its

cement works, nut, bolt and screw factories, horse-shoes, machinery, flour, etc. The city, as already mentioned, is in the centre of the Hastings County iron ore district, which, being in the vicinity of important hydro-electric powers, will no doubt before long be developed on a large scale. Peterborough is an important industrial centre, with some 116 factories, producing woollen yarns, fabrics, carpets, etc., electrical goods, Quaker oats, mining and mill machinery, lumber, canoes, pork products, boots and shoes, condensed milk, and many other lines; Oshawa has important automobile works, a rubber factory, hardware, musical instrument and other industries; and proceeding westward from Toronto, there are the Georgian Bay ports of Collingwood and Owen Sound, the first-named with important shipbuilding facilities unsurpassed in Canada, and the latter with numerous hardware, furniture, confectionery and other plants. In the Niagara Peninsula there are St. Catharine's, Welland, Niagara Falls, Port Colborne, etc., the centres of numerous manufacturing and fruit-canning plants; and the country lying west of Hamilton down to the south-western corner of the Province is full of cities, towns and villages which are not only the markets of a rich agricultural district, but have industries of every description dependent upon the ubiquitous hydro-electric power to which Ontario owes so much of its present and prospective prosperity. The principal centres in this part of the country are London, Kitchener, Brantford, Galt, Goderich, Guelph, Ingersoll, Paris, St. Mary's, St. Thomas, Stratford, Waterloo, Chatham, Sarnia and Woodstock. The south-western corner of the Province, just opposite to the city of Detroit, teems with towns and villages which are the Canadian homes of many United States manufacturing concerns, these "border" cities including Windsor, Sandwich, Walkerville, Amherstburg, Ford and Ojibway (at which latter place the Canadian Steel Corporation, Ltd., an offshoot of the great

United States Steel Trust, is building an enormous plant).

The vast territory described as Northern Ontario, or "New Ontario," so different from the older country dealt with above, is concerned for the present mainly with mineral and forestry development, though agricultural operations in the clay belt, consisting of no less than 16,000,000 acres of good land, especially suitable for the growing of cereal crops, will no doubt in due course render that country an important market for goods of every description from the United Kingdom and elsewhere, railway connections through this vast potential cornfield being already provided by the Canadian National system, one line crossing the belt from Quebec north of Lake Abitibi and thence to Winnipeg direct, and the other traversing the country from Sudbury north of Lake Superior to Port Arthur. Northern Ontario contains the important lake ports of Fort William and Port Arthur, the former being the terminal of the Canadian Pacific Railway grain shipping system, and the latter being that of the Canadian National Railway, culminating in a vast elevator of 10,000,000 bushels capacity. The two cities have, apart from the grain-handling plants, shipbuilding yards, flour mills, timber mills, and a blast furnace (when reconstructed, the blast furnace at Port Arthur, Ontario, will have capacity to handle 100,000 tons of iron ore annually), and are now co-operating in the exploitation of an important industrial district lying midway between them. They are likely to derive great advantages from the recent development of hydro-electric power on the Nipigon River, providing for an ultimate supply of 75,000 H.P., which power, coupled with the geographical position of the cities at the head of the inland waterways of the Dominion, should exercise a notable influence upon their future progress. Other business centres in "New Ontario" are Cobalt, the famous silver-mining centre, the richest field at present being exploited in the world ;

Cochrane, the point of junction with the Canadian National Railway system of the Temiskaming and Northern Ontario Railway line connecting with Toronto *viâ* North Bay, and northward towards James Bay; Fort Frances, an important pulp and paper making centre in the Rainy River district, near the Manitoba border; Gowganda, a silver and gold mining centre; Kenora, with flour and lumber mills; North Bay, the junction with the Canadian National Railway of the Temiskaming and Northern Ontario Railway, belonging to the Ontario Government, has lumber and mining industries; Porcupine, the well-known gold-mining centre; Sault Ste. Marie, with large steel works, car-shops, chemical and machinery industries; Sudbury, the famous nickel and copper mining and smelting centre; and other smaller towns concerned with mining and agricultural pursuits. There has been some talk during recent months of the establishment of a new Province in "New Ontario," whose interests are in some places divergent from those of the older settlements to the South, but there are of course many advantages in association with an older and financially richer population which will receive their full consideration before any definite step is taken in such a direction.

The three "**PRAIRIE PROVINCES**"—**MANITOBA, SASKATCHEWAN** and **ALBERTA**—contain a rapidly increasing proportion of the population of the Dominion. The gain in population achieved by Canada during the past decade, according to the census of 1921, was 2,029,000, and of this the greater share—1,260,000—is credited to the four Western Provinces, the growth of the West having been almost double that of the East. The division of the population is some 6,342,000 for the East, as against 2,893,000 for the West, but it is extremely unlikely that there will be a discrepancy between the two halves of the Dominion at the end of the next decade proportionately so large as that now existing. In the matter of buying power already, the figures

quoted above are not a reliable indication of the value of the market, and there is hardly any doubt that, man for man, the Western Canadian is capable of very much heavier purchases of British goods than his brother of the East, including as it does the Province of Quebec, large numbers of whose population have simpler tastes and a more restricted demand than that of the "English-speaking" population.

Western Canada, moreover, as compared with the industrial East, consists at present more predominantly of purchasers than of producers of fully manufactured products, and is consequently worthy of more careful attention by British firms than has sometimes been accorded to it. The huge crops of wheat, oats and other grain crops produced on the prairies, the increasing devotion to dairying, and the development of lumbering and mineral production, all tend to increase buying power for British goods, particularly in view of the fact that a large section of the people is of English, Scottish, Irish or Welsh birth, keenly interested in things British, in the narrower as well as the "Empire" sense of that word, and reached far more by advertisements in the press of United Kingdom products than by actual sight of them in large city stores, though those emporiums of commerce are by no means lacking in Western Canadian cities like Winnipeg, Calgary and Edmonton.

The growing use made of the Vancouver-Panama route to Europe from Western Canada and the forthcoming further development of the Great Lakes-St. Lawrence waterways will bring the Western Canadian market almost as close to the United Kingdom from the point of view of convenient access as that of the East. It is possible that vessels will before long be able to transport large cargoes from London, Liverpool, Manchester or Glasgow directly to Fort William and Port Arthur, from which points it is a comparatively short and inexpensive rail haul to Winnipeg, the western metropolis, setting British exporters, from the trans-

portation point of view, at a disadvantage very little greater than that of their Canadian or United States competitors. Those who think of Winnipeg as far inland forget that this city is only 400 miles from the huge Great Lakes steamboats which transport the millions of bushels of grain to eastern markets.

The agricultural developments possible in Western Canada now that immigration has revived are of tremendous importance, apart altogether from the growth of other industries now almost in the foundation stage. Conveniently close to railway lines built at pre-war costs, there are awaiting cultivation approximately 34,000,000 acres of fertile land capable of producing additional crops of 170,000,000 bushels of grain per annum, with a monetary return probably not less than \$400,000,000; and the propaganda of the recently established Western Canada Colonisation Association is being specially directed to the settlement of this privately owned land before further developments are undertaken on a large scale in regions requiring more railway construction. It must be remembered, however, that these 34,000,000 acres do not at all represent the extent of arable land awaiting cultivation in the West, and it has been computed that there are 225,000,000 cultivable acres in the four Western Provinces, out of which only 35,000,000 acres are producing crops at the present time, leaving another 190,000,000 acres yet to come under the plough.

While Western Canada must for long remain predominantly a country of rural pursuits, the progress of industry and manufactures is often lost sight of. The West is, however, making important strides in the working up locally of its raw materials, and an indication of this progress is the remarkable increase in the membership in Western Canada of the Canadian Manufacturers' Association. To-day there are more than 700 members of this body located west of the Great Lakes, whereas twenty years ago there was not one.

Dealing with the MARKET FOR BRITISH GOODS in Western Canada in a recent Report to the Department of Overseas Trade, Mr. L. B. Beale, His Majesty's Trade Commissioner at Winnipeg, intimated that there was every indication that imports from the United Kingdom would continue to increase, and he had no hesitation in stating that Great Britain could substantially increase her share of Canada's requirements if more aggressive methods were followed. In textiles and iron, steel and engineering products this country should make an exceptionally good showing in the next few years. The United Kingdom had already almost caught up her pre-war proportion of Canadian imports ; she could substantially increase that trade if careful attention were given to proper local representation ; packing and methods of distribution ; deliveries to specified time ; more aggressive methods in regard to staple lines, particularly metal and engineering products, telephones and other electrical equipment. In regard to certain lines Mr. Beale reports :—

FARM TRACTORS.

“In farm tractors of the medium size and moderate price variety the United Kingdom should be able to compete. Western Canada has experimented with tractors of various sizes and styles for some years, and it has been found that a tractor weighing from 4,000 lb. to 6,000 lb., having 12 to 14 H.P. at the draw-bar and 25 to 27 H.P. at the belt pulley, gives the best results for the average grain lands of the West. Such tractors are made in the United Kingdom. The British product is generally a very much better engineering job than the average American machine. Until now price and power have been the main determining factors in the sale of tractors in Western Canada. From now on, however, a better quality tractor will be demanded, and herein lies our opportunity. Slight modifications in the usual British tractor will be necessary to suit the Western Canadian market, such as air filtration and

height and style of draw-bar, but such alterations will add little or nothing to the cost, and will be easily and readily made.

FARM ENGINES (STATIONARY).

“I am very hopeful that the United Kingdom will develop an export business in volume in this line to Canada. Many of the types made in Great Britain are suitable for the Western Canadian market without alteration. Our manufacturers in this line, generally speaking, lack representation or business connections in that market. Hitherto the farm engine of small power ($1\frac{1}{2}$ H.P. to 4 or 5 H.P.) has not been produced in this country to the same extent as the larger sizes. This range of power covers 75 per cent. of the very extensive farm engine trade of Western Canada (30,000 stationary engines were imported by Canada from the United States in 1920). A satisfactory result will to a great extent depend on the sales methods employed, and considerable time was spent in discussing this phase of the trade. For farm engines sales by the manufacturer outright to a large distributor in Western Canada will, in my opinion, prove most satisfactory.

ELECTRIC LIGHTING SETS.

“There is a large sale of electric lighting sets suitable for the farm-house.

TELEPHONE EQUIPMENT.

“The non-participation in the past of United Kingdom firms in the very large telephone requirements of Western Canada has been due, I think, to the relatively small total production in this country, rather than to unsuitability in style, etc. Now, however, the manufacturing of telephone apparatus in the United Kingdom is extending rapidly. I am of the opinion that this branch of industry can secure substantial trade in

Canada. The manufacture of automatic telephone apparatus is rapidly extending in the United Kingdom. In instruments and exchange equipment for automatic work we should secure good business.

ELECTRICAL HOUSEHOLD APPLIANCES.

"In this branch of industry I am quite confident, after careful investigation, that we can participate in the Western Canadian requirements. Western Canada offers a particularly good field, as hydro-electric development is rapid and power cheap.

SCISSORS, MANICURE SETS, SURGICAL AND VETERINARY INSTRUMENTS.

"The trade in veterinary instruments is already large and valuable in Western Canada, and is rapidly increasing. Hitherto United Kingdom firms have shared to a very small extent only, but there appears to be every reason for a substantial participation from now on. Sheffield-made manicure sets and scissors of the medium and better qualities can well compete with those from the United States of America, but in the cheaper lines (in which a large trade is done in Canada) Japan and the United States will provide keen competition."

COTTON GOODS, HOSIERY, ETC.

Western Canada is a generous purchaser of men's shirts and collars, and Mr. Beale is of opinion that, with proper representation, the United Kingdom can increase her trade with Western Canada in these goods, as well as hosiery and underwear.

MOTOR CARS AND MOTOR TRUCKS.

"American styles and standards prevail in Canada. The Canadian requires first-class service in spare parts, and this is excellently furnished by the many dealers

and agents in all parts of Canada handling American and Canadian made cars. The Canadian purchaser prefers a standardised car rather than a car built and equipped to individual taste. An excellent five-passenger four- or six-cylinder car, fully equipped with electric starter and lights, can be purchased retail in Canada for £400 to £500. The finish or quality of such a car will not equal that of the British-built car, but it is the style, standard, price and power desired. The demand for the large, first-class British-built car in Canada will be quite limited for some time. In motor trucks a much better opportunity exists. One well-known British firm has a few trucks in daily use in Western Canada, where they are giving complete satisfaction. More aggressive methods of merchandising are necessary.

COMPETITION AND REPRESENTATION.

“The United Kingdom can undoubtedly compete to a much greater extent than hitherto in the market if more aggressive methods are adopted. A satisfactory volume of business can very seldom be secured by correspondence. Distance causes too much delay in quotations, etc., and many more United Kingdom firms should have first-class representation. In Western Canada, where the population is increasing very rapidly, over 90 per cent. of the manufactured requirements are imported from Eastern Canada and other countries. Western Canada should in nearly all cases have local representation separate from Eastern Canada. In most cases one agent for Eastern Canada, resident in Montreal or Toronto, and one agent for Western Canada at Winnipeg or Vancouver, will be found essential and profitable. An efficient agent resident at Winnipeg or Vancouver is in intimate and constant touch with the importing trade of the West, and if properly supported by a United Kingdom firm manufacturing the right type of goods, success will

follow. The success of the United States of America in securing Canadian business has not been due entirely to proximity and suitability of goods. Prompt delivery, the selection of the right type of resident agent, supported by the manufacturer with full samples, up-to-date information as to market prices, and an attractive rate of commission for trade secured, have been vital factors in the matter."

WESTERN CANADA'S CROPS IN 1921.

Comparatively few people outside those with a personal knowledge of the Dominion realise how closely the prosperity of Canada is connected with the harvest. While Western Canada more directly feels the result, it is soon apparent throughout the whole Dominion, and it is probable that this will be the case for many years to come.

For the three Prairie Provinces the estimates of the 1921 crops in bushels are: Wheat, 308,925,000 (234,138,300 in 1920); oats, 363,185,000 (314,297,000 in 1920); barley, 48,619,000 (40,760,500 in 1920); rye, 23,113,000 (8,273,600 in 1920); flax seed, 4,175,000 (7,588,800 in 1920); the crops being divided among the Provinces as under:—

	Manitoba. Bushels.	Saskatchewan. Bushels.	Alberta. Bushels.
Wheat .	48,142,000	201,995,000	58,788,000
Oats .	60,112,000	211,353,000	91,720,000
Barley .	22,688,000	13,289,000	12,642,000
Rye .	4,125,000	16,433,000	2,555,000
Flax seed .	540,000	3,500,000	135,000

THE PROVINCE OF MANITOBA, with barely 700,000 people on its 251,832 square miles, is a vast tract of country larger than Holland, Belgium and Germany combined, possessing many and varied resources, the exploitation of which, apart from grain

production and dairying, is yet to be begun. The basic industry of the people settled in the southern portion of this great area is agriculture, and Manitoba became famous very soon after its foundation for the fine quality of its hard wheat. Fertility of soil and dryness of climate have, in fact, made Manitoba one of the most productive parts of Canada for field crops, the 1920 harvest having been worth \$140,000,000, including a wheat crop of 37,600,000 bushels, valued at \$70,000,000, an increasing area being sown year by year to oats, barley, rye, potatoes, turnips, fodder corn, hay and clover.

While the Province of Manitoba is best known to the outside world for its hard wheat and other grains, the experiences of the past ten or fifteen years indicate that its real agricultural future will be along the direction of general or mixed farming, there being comparatively few farmers in the Province restricting their operations to grain-growing, as in former years. Stock-raising and dairying have proved exceedingly successful, and fruit-growing, bee-keeping, poultry-raising and the cultivation of vegetables and roots in large quantities for stock feed and for the Winnipeg market, now constitute a very large part of the activities of the farmers. Hemp-growing in Manitoba has been so successful that the industry can now be placed on a commercial basis. Stock-raising is particularly successful, the climate, with its exceptional amount of bright sunshine all the year round, being one of the important factors in its development, and the natural pastures of the Province are extremely rich. In 1920 there were in Manitoba 356,628 horses, 221,785 milch cows and 536,189 other cattle, 156,716 sheep and 212,542 swine, and there has been in recent years a steady increase in the number of beef and dairy cattle and in the amount of dairy produce of all kinds turned out on the farms and in the co-operative butter and cheese factories at work in this Province, the city of Winnipeg having a very important cattle market. Twenty-five thousand Manitoba farmers

are engaged in dairying, and the value of Manitoba's dairy products in 1920 was \$16,780,000, creamery butter being the main item. The raising of sheep is also on the increase, and Manitoba's wool production in 1920 amounted to a considerable proportion of the £5,000,000 accredited to Western Canada as a whole.

The FOREST resources of Manitoba, though far more important than is usually supposed in a Prairie Province, have not yet been utilised to a very considerable degree, owing perhaps to their remoteness from markets more easily served by other Canadian Provinces. Spruce, pine and tamarack timber is, however, cut, and as population grows in the West this industry will assume greater dimensions.

The numerous lakes and rivers found in this Province represent an important source of HYDRO-ELECTRIC energy amounting to many millions of horse-power, much of which is within easy reach of its principal business centre, the city of Winnipeg. Government surveys have shown that there is at least 500,000 H.P. available on the Winnipeg River at distances varying from fifty-two to seventy-five miles from the capital city, which is at present served by the municipal power plant at Pointe du Bois with a turbine installation of 47,000 H.P. and a privately-owned plant of 37,600 H.P. at Lac du Bonnet belonging to the Winnipeg Electric Railway Company. The Pointe du Bois plant is being extended, and its ultimate capacity is to be 100,000 H.P. A new electric power development plant, which will have a capacity of 168,000 H.P. and will cost about \$10,000,000, is to be erected at Great Falls, on the Winnipeg River, sixty-three miles from Winnipeg. It will be constructed in six units of 28,000 H.P. each, and will be completed in 1924. In addition to the very valuable water powers of the Winnipeg River, there are potential water powers on a large scale in the new districts of Northern Manitoba, and Government surveys on the Saskatchewan, Nelson, Churchill, Grass and Burntwood Rivers show that over

3,000,000 H.P. is available at ordinary minimum flow and that ordinary methods of storage would increase this to about 4,300,000 H.P., dependable upon under all conditions, much of this power being contiguous to vast mining and pulp-wood areas. The production of fertilisers by electro-chemical methods is an important probability in this part of the Province.

The steady influx of population to the cities, to the rural districts and throughout the northern areas of the three Prairie Provinces is creating a heavy and growing demand for manufactured goods and will inevitably result in a rapidly-increasing demand for cheap and dependable power. The rapidly-growing market for industrial products offers possibilities to municipalities which their authorities are quick to realise, as undoubtedly the industrial activity will be centred chiefly in those cities where cheap power and good transportation facilities can be obtained.

MINING is another industry which awaits fuller development, but which has already begun to yield good results. Deposits of gold, copper, iron, tungsten, molybdenite, limestone, granite, marble, brick clay, cement and gypsum are available, but their output in 1920 was worth only \$3,900,000. Since Northern Manitoba was opened up by railway construction there, the Province has engaged the attention of mining engineers, including an important British company, and confidence is expressed as to the wide extent and commercial value of the gold-bearing quartz of the Flin Flon and other areas, as well as of the iron and copper sulphides, development work interrupted by the war having now been resumed. The resources of Northern Manitoba are enormous—its mines, timber, fisheries, crops, etc., yielded products valued at nearly \$3,500,000 during the year 1919. Copper and gold ores came out of the north, though the surface has hardly been scratched, to the amount of \$694,633, and new discoveries of these metals are constantly reaching Le Pas, the headquarters for prospectors and mining men in that part of the country.

With a further development there of roads and railways, the present annual production is but a fraction of that of which this new district is capable.

Lignite coal estimated to amount to 150,000,000 tons is available in South-Western Manitoba, and will be developed in due course for the manufacture of anthracite fuel for domestic purposes on the prairies and in the cities, in an effort to combat the present dependence of Manitoba on imported Pennsylvania coal.

The lake and river fisheries of Manitoba had a catch in 1918 worth \$1,820,157, and the trapping of fur-bearing animals still brings in a large income to the aboriginal population and to the traders dealing with them. A new industry just started in Northern Manitoba is the ranching of caribou and reindeer for the meat, milk, hides and other products to be derived therefrom.

The Province of Manitoba had in 1918 some 1,444 industrial plants capitalised in all at \$105,983,159, and employing 23,887 persons at wages or salaries aggregating \$19,389,681. The value of the output at these plants was \$145,031,510, the great bulk of which was credited to the city of Winnipeg. The chief manufactured products are flour and oatmeal, creamery butter, dressed meats, boxes, sashes and doors and other wood products, machinery, structural castings, pressed brick, marble, glass, flax-seed oil, paint, leather, clothing and motor trucks.

Manitoba has 4,672 miles of railway, almost all of which is situated in the southern portion of the Province, Winnipeg having twenty-seven lines of track radiating out of or passing through the city. Manitoba is the only one of the Prairie Provinces possessing a seaboard, which, with the development of the Hudson's Bay Railway, may become at some future date a valuable trade asset.

Of the business centres of Manitoba, Winnipeg is, of course, far and away the principal, being a place of

nearly 200,000 people ; it has the largest grain market in the world, and its wholesale turnover is in excess of \$250,000,000 annually, an enormous mercantile territory being tributary to the city. Winnipeg's bank clearings in 1920 reached a total of \$3,016,054,299, and its industries, dependent upon hydro-electric power which will shortly reach a total of 175,000 H.P., include nearly 800 plants. With an invested capital of \$96,698,825, an estimated annual pay-roll of \$24,308,982, the output of Winnipeg's industries in 1920 was valued at \$120,213,000. Of this sum flour and grist mills absorbed \$14,487,398 ; slaughtering and meat packing, \$6,236,236 ; butter and cheese, \$2,905,648 ; bags, cotton, \$2,750,623 ; electric light and power, \$2,335,907 ; lumber products, \$1,818,567 ; bread, biscuits and confectionery, \$1,816,671 ; printing and publishing, \$1,785,001 ; malt liquors, \$1,663,905 ; coffee and spices, \$1,704,424 ; foundry and machine shop products, \$1,493,560 ; furnishing goods (men's), \$1,147,456. The city, in common with the other large business centres in Western Canada, has some splendid stores, and is the base of operations of numerous wholesale distributing concerns serving the great body of agriculturists living on the Prairie Provinces, whose buying power for manufactured goods of every description is enormous, consisting largely of persons of British birth and descent, who will have a pronounced predilection for goods which are familiar to them through advertising in the Homeland or in English publications, and which can often be delivered in Western Canada at a cost comparing favourably with that of Canadian and American products, all of which must, of course, bear the weight of a long railway haul.

Apart from Winnipeg, Manitoba's business centres are predominantly small towns, which are the markets for the produce of the surrounding agriculturists and the distributing points for goods imported into the Province from elsewhere, this great Western Canadian market for British goods being one which must

inevitably grow by leaps and bounds as settlement proceeds, and as the products of this immense granary of the Empire gradually increase in both volume and value. Among the larger centres, however, may be cited Brandon, a town of over 15,000 inhabitants, in Western Manitoba, which has many industries and over twenty wholesale distributing houses, being the centre of an agricultural district containing nearly 300 small towns and villages ; Portage la Prairie, fifty-six miles west of Winnipeg, a growing town of 6,000 souls, possessing several industries, and which is a popular summer resort ; Selkirk, on the Red River, at the head of Lake Winnipeg, twenty-two miles north of Winnipeg, which has important hydro-electric steel furnaces and rolling mills, is the port of shipment for the Rice Lake gold-fields and handles most of the produce of the Lake Winnipeg fisheries, aggregating not less than 7,000,000 lb. annually ; Le Pas, at the junction of the Saskatchewan and Opasquia Rivers, with lumber mills, gold and copper mines, is the outfitting point for the famous Beaver Lake and Flin Flon gold-fields, and the point of contact of the Hudson's Bay Railway with the main Canadian National Railway system.

In the Province of **SASKATCHEWAN** we have a country of 243,382 square miles, at present peopled by some 850,000 persons who are predominantly concerned with the various operations of agriculture, and who, for this reason, must be very large purchasers of manufactured products of every description either from the United Kingdom or from other countries whose business men will study their requirements and endeavour to fill their needs. Saskatchewan's population is more distinctly rural than that of any of the other Canadian Provinces, 72 per cent. of the people living on the land, and the balance in the cities and towns. Saskatchewan has many and varied resources, but, as compared with the other Canadian Provinces, it is far more likely to remain a country especially given over to agriculture and other

rural pursuits, to the exclusion of urban industries. The Province is the principal wheat-growing section of Canada, and in the bumper year of 1915 some 224,312,000 bushels of wheat were cut in Saskatchewan, or 57 per cent. of the total wheat crop of the Dominion. Seven times in the past eight years Saskatchewan wheat has won the first prize at international exhibitions held in the United States, for the fertile plain lying midway between the Rocky Mountains and the head of the Great Lakes is unrivalled in the world for its vast extent of uniformly good wheat land. When it is remembered that only a quarter of a total area of 94,000,000 acres suitable for the cultivation of grains is sown to crops, the potential wealth of the Province can better be realised. Oats, barley, flax and rye are the other chief grains produced, and the total value of field crops of every description harvested in 1920 was \$271,213,000.

The claim is made by Mr. Norman Ross, Superintendent of the Dominion Forestry Farm at Indian Head, Sask., that all fruits can be successfully grown in the Prairie Provinces. Mr. Ross has grown on the Experimental Farm apples, plums and hybrid cherries, to say nothing of strawberries, raspberries, currants, gooseberries and other bush fruit. During the 1921 season 3,000,000 or more trees were distributed to farmers from Indian Head. The time was, long ago, when it was commonly held that soft fruit could not be grown on the prairies. Now it is predicted by experts that within ten years Manitoba at all events will be producing all the strawberries required.

LIVE STOCK is coming into greater prominence every year, and the number of animals is steadily increasing. Saskatchewan has 939,805 horses—more than any other Canadian Province—354,507 milch cows and 969,555 other cattle, 160,918 sheep and 321,900 swine, and dairying is growing in importance year by year, the value of its products in 1920 having reached \$23,043,048. The largest single item was butter, of which 29,009,000 lb., valued at \$12,676,670.80, were

produced, some of the output of this Province having already been marketed in Great Britain. During 1920 forty-seven creameries operated in Saskatchewan, and manufactured 6,642,083 lb. of butter, valued at \$3,973,380. Wool is marketed on the co-operative system, and sheep-raising is making good progress under the encouragement of the Dominion and Provincial Governments.

The FOREST area of Saskatchewan is nearly 100,000,000 acres, with 150,000,000 cords of standing timber, including 55,000,000 cords of pulpwood. The chief varieties of wood in the Province are spruce, tamarack and jack pine, the lumber cut in 1919 having been worth \$1,900,000.

Over 7,000,000 lb. of FISH were taken in the northern lakes of Saskatchewan during the winter season of 1920-1921. The catch was principally whitefish, and among other varieties were lake trout and sturgeon.

The MINERAL resources of Saskatchewan, though hardly yet touched, are known to be very extensive, there being valuable deposits of gold, silver and copper in the northern portion of the Province. There are also vast deposits of lignite, estimated to contain thousands of millions of tons of low grade fuel capable of being briquetted into a satisfactory substitute for anthracite coal, and the exploitation of this lignite has already been begun by a board established jointly by the Dominion and Provincial Governments concerned. Saskatchewan is not so fortunate as the other Canadian Provinces in the matter of WATER powers, and it is therefore likely that electrical energy may eventually be developed on a large scale at the lignite mines. The Province abounds in structural materials, such as first-class clays, and in deposits of gypsum, salt, as well as sodium sulphate (Glauber salts), for which there is a growing market.

During the hunting season of 1920 FURS valued at more than \$2,000,000 were sold by Saskatchewan trappers.

The total value of the manufactured products of Saskatchewan in 1918 was \$49,998,135, produced in 1,422 establishments employing 8,188 persons, the chief goods turned out being flour and oatmeal, lumber, sashes and doors, bricks, cement, tiles and pottery, and there are a few machine shops and foundries in the Province.

Saskatchewan comes next after Ontario in the extent of its railway trackage, amounting to 6,172 miles, and there are also some 5,000 miles of motor highway, the proportion of automobiles to the population in this Province being higher than in any country in the world, namely one to every fourteen persons.

The BUSINESS CENTRES of the Province are obviously the market towns, where wholesalers of imported and domestic manufactured products distribute these goods in volume corresponding with the immense buying power conferred by the sale of the agricultural products of this vast fertile region. Regina, the capital city of Saskatchewan, has a population of 40,000, and is the principal distributing point in the Canadian Middle West, having also industries of the kind associated with a purely agricultural community, such as flour mills, abattoirs, lumber mills, tanneries, etc.; Saskatoon, a city of 30,000 people 160 miles north of Regina, is the principal centre in a district of 47,000 square miles, embracing over 200 places situated on 2,225 miles of railway line, and has a number of large elevators, flour mills, oatmeal plants, and many important wholesale houses; Moose Jaw, with 23,000 people, is the centre of a rich wheat-growing district, and has similar industries; and other business centres of a similar character are Prince Albert, North Battleford, Swift Current, and Weyburn.

THE PROVINCE OF ALBERTA, sometimes known as "The Foothill Province of Canada," is an enormous territory of 252,925 square miles, double the size of the British Isles, but with a population of less than 600,000 persons, mainly agriculturists, ranchers or miners. The

area of arable land in the Province is estimated at 100,000,000 acres, of which about 8 per cent. is at present under cultivation. The soil is rich in minerals and is well adapted to the growing of cereals, whilst the luxuriant growth of wild grasses, noticeable here to a greater extent perhaps than elsewhere in Canada, provides Alberta with the main requisites for successful live stock raising. At an early period in its history this country was the home of large ranches, which have to some extent been superseded by cultivated fields with the advent of the grain-growing era. Indeed, ranching, properly so called, is likely in Canada to be driven into the wild country of the Canadian Northland and to be concerned not with the domestic animals usually raised in this way, but with the wild animals indigenous to the country, *i.e.*, the caribou and musk ox and the imported reindeer.

FIELD CROPS harvested in 1920 had a total value of nearly \$200,000,000, the greater part of which represented the yield of spring wheat and of oats. The cultivation of new land in the northern districts, particularly the Peace River country, and the extension of the irrigation system in Southern Alberta, covering 1,000,000 acres in all, should do much to assure this Province of a continuous series of satisfactory harvests, as, even without artificial aids, Alberta is noted for the exceptional quality of its cereals, and in years above the normal for the abundance of the yield.

STOCK-RAISING from the pure breed continues to be one of the most profitable industries, and in 1920 there were 741,851 horses in the Province, in addition to 305,607 milch cows and 1,050,334 other cattle and calves, 383,424 sheep and 286,556 swine, it being possible to winter all cattle, except milch cows, in the open. The wool clip is steadily increasing, the 1921 figure being about 2,250,000 lb. In Central and Northern Alberta dairying has been greatly encouraged by the growth of centres of population and the consequent heavy local demand for butter and cheese, the total production of which reached about \$34,000,000 in 1920.

One creamery alone has an annual output of 3,000,000 lb. of butter and 30,000 lb. of cheese, and Edmonton is reckoned to be the greatest butter-making centre in the Dominion.

Alberta is an important factor in the Canadian MINING industry, the value of its output in 1920 having reached \$33,721,898, the Province leading all the others in the production of coal, of which nearly 7,000,000 tons were marketed in 1920. The area of practicable coal-mining is limited to some 16,000 square miles, with an estimated content of 90,000,000,000 tons, of which 90 per cent. is lignite, the remainder being bituminous and anthracite. There are also excellent structural clays, and deposits of gold, copper, zinc, gypsum, salt, petroleum and natural gas. The annual pay roll of the colliers in this Province is in the neighbourhood of \$14,000,000.

The FOREST resources of the Province are estimated at 21,000,000,000 board feet, chiefly spruce, pine and fir, the reserves, covering 19,435 square miles, being administered by the Dominion Government.

FUR-TRAPPING is an old industry which still flourishes in Alberta, the Peace River district being particularly rich in fur-bearing animals; and Edmonton is one of the greatest markets for raw furs in the world. Fur-farming, particularly in the case of red and silver foxes and Karakul sheep, is a successful industry.

Alberta has WATER POWERS estimated at 466,000 H.P., of which only some 32,992 H.P. are yet developed. The Peace, Athabasca and Slave Rivers, in the north, possess a number of excellent power sites, and the apparently imminent mineral developments in that region will probably lead to some development of these water powers. The industries of the Province have, however, ample resources in power from the coal mines and natural gas fields, and industrial development on a large scale is one of the strong probabilities here during the coming generation. There were in Alberta in 1918 some 1,252 MANUFACTURING plants, employing 9,894 persons on wages and salaries totalling \$10,249,465,

and the value of the articles turned out was \$82,434,422. The chief manufactures are clay products, coke, coal briquettes, sashes and doors, leather goods, flour and cereals, dressed meats and dairy produce.

Calgary, with a population of 63,117, and Edmonton, the capital city, with 58,627, are the principal BUSINESS CENTRES in the Province, the first-named place being the centre of an immense agricultural and stock-raising district and the chief supply station for the Alberta and British Columbia Rocky Mountain mining district. It is a flour-milling centre, and has a very important cattle market. In the neighbourhood are extensive coal beds, and the district has some promise of becoming an important oilfield. Edmonton is also the distributing point for a wide territory, including the Peace River country and the Mackenzie oilfields, and is also the fitting-out point for the trappers and prospectors going into the Canadian Northland. Its industries have an annual output worth more than \$15,000,000, and include three meat-packing plants, three flour mills, as well as brickyards, saw-mills, creameries and other manufacturing concerns. The Province is of course covered with numerous towns and villages, which distribute goods to the neighbouring farmers and ranchers, and where the products of the farms are marketed.

The length of railway track in Alberta is some 4,650 miles, this being developed from time to time, particularly northward and into the Peace River country.

BRITISH COLUMBIA, the beautiful mountain and Pacific coast Province of Canada, is an enormous territory of 353,416 square miles, with a population of about 720,000, and its principal industries are those concerned with forestry, mining, fishing and fruit-growing, though there are large areas suitable both for grain-growing and live stock raising.

The forest area of British Columbia contains more

than half the standing timber of Canada, extending over 11,000,000 acres, with some 350,000,000,000 board feet, of which at least 200,000,000,000 feet are commercially valuable. The climate of the Pacific coast produces a much more rapid growth of timber than in other parts of Canada, and is favourable to a great many varieties, including the huge Douglas fir, red cedar, hemlock, balsam and spruce, the last-named being greatly in demand for aeroplane-building during the war. The total value of forest products for British Columbia for 1920 was \$92,628,807, as compared with \$70,285,094 in the previous year. The Province exports lumber on a very large scale to Far Eastern and other markets, 1920 exports amounting to 120,000,000 feet out of the total production of 290,000,000 feet. A large tonnage in pulp and paper is being produced on the Northern British Columbia coast. At the plant on Powell River 225 tons per day are being manufactured, and at the Ocean Falls works the output is 250 tons daily. At Swanson Bay and Beaver Cove 50 and 25 tons respectively are being made. Substantial quantities are also being produced at Port Alice, on Quatsino Sound.

MINERAL production in 1920 was worth \$38,044,915, the metalliferous mines being responsible for the major part of the total. Copper is the principal metal exploited, and in this Province are the three largest copper-mining companies in the British Empire, their production being about 45,000,000 lb. in 1920. Other metals found are iron, zinc, gold, lead and silver, and the foundation of a smelting plant in British Columbia for iron and steel is an important possibility during the next year or so. There is believed to be a market on the Pacific coast of Canada and the United States for some 2,000,000 tons of iron and steel per annum, and in addition to the local demand, now supplied mainly from Pennsylvania and incurring high transportation costs, there is the rapidly developing export market in the Far East, Australasia, the Pacific islands, and

both the west and east coasts of Central and South America, with which British Columbia already has direct steamship connections. The production of platinum is likely to develop into an important industry before long, investigations conducted over a number of years having disclosed that the Fraser River and adjacent country constitute one of the principal deposits of this precious metal in the world. A large body of strontium sulphate and strontium carbonate, called respectively celestite and strontinite, has been found on Tidewater, 200 miles north of Vancouver. It is said to be 50 acres in extent. Strontium is used in the refining of beet sugar, and it is also thought it may be found suitable to use in white lead in place of barium.

The most notable non-metallic deposit is, of course, coal, for which there is a growing bunker market on the Pacific coast. The field covers in all some 65,000 square miles, and the product is excellent for steam-raising purposes. Important mining developments are forecasted in the recent announcement that the Canadian Pacific Railway Company has begun a thorough survey of 2,000,000 acres of mineral-bearing lands on Vancouver Island. It is intended to develop coal-mining, and there is some possibility that a smelter may be set up on the island.

The SEA FISHERIES of British Columbia, extending over some 80,000 square miles, in addition to the salmon-spawning grounds of the Fraser and Skeena Rivers, have a greater annual value than those of any other Province in Canada, their production in 1919 having been worth \$25,300,000, and including salmon, halibut, herring and cod. The canned salmon industry on this coast is famous throughout the world, and the total pack for 1920 was 1,187,616 cases.

The AGRICULTURAL PRODUCTS of British Columbia were worth in 1920 some \$27,017,500 for field crops, in addition to the fruit crop, consisting of apples, plums, peaches, pears and strawberries. (Two straw-

berries weighing a quarter of a pound and grown in a Victoria, British Columbia, garden, were on exhibition in that city recently.) The principal grain crop is oats, and hay and clover are also grown in connection with the stock-raising industry. The fruit-growing industry of this Province is comparatively new as a commercial undertaking, the first important plantings having been made only twenty years ago. By 1919 the production had reached a total value of \$7,772,000, more than 4,000 growers having invested upwards of \$35,000,000 in the industry. British Columbia's exports of apples alone for the 1921 season reached about 5,000 car loads, containing 3,750,000 boxes, or double the shipments for 1920 and the largest export in the history of the Province. Much of the export trade with European ports is done *viâ* the Panama route. Tobacco is a crop growing in favour in the Province, and in the Lower Fraser Valley, the Gulf Islands and on Vancouver Island, there is developing a seed-growing industry which gives promise of becoming a valuable source of supply of seeds of mangel, turnip, beet, carrot and onions. Not long since also some 5,000 tons of cascara bark were shipped from Vancouver to British and United States markets, and reports received indicate that the industry has a promising future. The production of turpentine from the Douglas fir is also making satisfactory progress.

The annual value of the LIVE STOCK production is over \$27,000,000, and there were in 1920 44,070 horses, 79,520 milch cows, and 75,252 other cattle, as well as 46,474 sheep and 44,101 swine; the output of dairy products in 1919 was worth \$2,500,000.

The MANUFACTURING INDUSTRIES of the Province carried on in 1918 in some 1,786 plants, capitalised at \$244,697,241 and employing 44,039 persons at salaries or wages amounting to \$50,422,163, had an output then worth \$216,175,517, and consisting mainly of lumber and wood products, pulp and paper, coke, steel and wooden ships (eighteen steel vessels were completed or laid down in the British Columbia yards during 1920,

approximately 159,600 tons), canned fish and fruit, dairy produce, bricks and pottery, cement and metallurgical products, the woollen and cordage industries being of recent inception. The Province is fortunate in the possession not only of vast resources in coal, but WATER POWERS estimated at 3,000,000 H.P., of which nearly 300,000 H.P. has already been developed for public utilities and manufacturing plants, one company—the British Columbia Electric Railway Company—having a total capital investment of \$65,000,000. A recent incorporation in this Province was that of the Bridge River Power Company, providing for an initial development at Seton Lake of 50,000 H.P. and an ultimate capacity of 360,000 H.P.

British Columbia has, of course, admirable transportation facilities. There are 3,000 miles of railway in the Province, including the main line and several branches of the C.P.R., which first bound the Province to the Canadian Dominion, the Canadian National Railway system being represented by its line from the Alberta boundary in Jasper Park to Prince Rupert, this route being connected by a line running north-west from Vancouver and joining the main line near Mount Robson. The forthcoming completion by the Provincial Government of the Pacific Great Eastern Railway will give the Canadian National system another connection with Vancouver from Prince George. There are 15,000 miles of roads in British Columbia. The Province is reached from England directly by sea through the Panama Canal, and has also several steamship lines connecting her ports with China, Japan, India, the Straits Settlements, Australia, Alaska, the Pacific coast of North, Central and South America, South Africa, with Canadian Atlantic ports, the West Indies, etc.

The first announcement of Mr. H. H. Stevens, M.P. for Vancouver, on his appointment to the Federal portfolio of Trade and Commerce, was to the effect that an office of his Department would be established in

Vancouver with the object of encouraging trans-Pacific trade. For many months there has been intermittent demand from commercial interests there that some such action should be taken by the Federal authorities. It has been pointed out that the Canadian Government Merchant Marine has to-day a considerable fleet of cargo vessels plying from the port. If it is to be made profitable to maintain such an extensive service as is planned, including lines to South America, India, and other points in the Far East and to Australia and New Zealand, it is thought essential that some central agency should exist to co-ordinate the pioneer work which is to be done.

British Columbia's principal BUSINESS CENTRES are, of course, the ports of Vancouver and Victoria (on Vancouver Island). Vancouver is a city of over 123,000 people, situated in a splendid position astride three natural harbours, with eighty miles of water frontage and forty miles of anchorage. The port is 8,820 miles from Liverpool *viâ* the Panama Canal, and important developments are taking place in the harbour to prepare for the expansion which is expected with the development of this route as well as the economic uprising of the countries of the Far East, with which British Columbia is in direct touch by its many steamship connections. Imports through the port in 1920-1921 were worth \$64,731,912, and Canadian exports valued at \$49,577,015 passed out this way, the city being the terminal of the two great Canadian transcontinental railway systems as well as the principal port for British Columbia import and export trade. The total shipping cargo handled at Vancouver aggregated in 1920 some 2,465,000 tons. Of this quantity 1,670,000 tons were cargo landed. Vancouver is an important distributing point for goods of every description, and its bank clearings in 1920 reached a total of \$878,901,621. Vancouver shipbuilding yards have a high reputation for efficiency, and thirteen large steel steamers were launched there in 1920. The coastwise shipping at the

port is considerable, and upon the completion of the Canadian Government Merchant Marine programme there were on routes based on Vancouver not only the well-established and efficient services of the Canadian Pacific Steamships to the Far East and Australasia, and those of the Blue Funnel, Furness, the Robert Dollar, Royal Mail Steam Packet, Holland-America and the Japanese lines, but also twelve Government-owned 8,300-ton freight carriers. Should the requirements of the port demand it, other vessels are to be transferred from the Atlantic to the Pacific, as, notwithstanding the slump in foreign trade during the winter of 1920-1921, the C.G.M.M. vessels from Vancouver made steady and well-laden runs to Australia and New Zealand, calling in with freight at the Hawaiian and Fiji islands, as well as inaugurating the India, Orient and South African routes with bumper cargoes. People in British Columbia feel that it is of great benefit to the country that the many millions of dollars expended by shippers for freight shipped on Canadian-owned and operated steamers remain in the Dominion and tend to make the balance of trade more favourable to their home country. In 1922 the Canadian Pacific Steamships will have four large modern passenger vessels, *Empress of Russia*, *Empress of Asia*, *Empress of Canada* and *Empress of Australia*, in the service, together with two large freighters. The latter will, of course, be increased in number if traffic conditions warrant. The Vancouver-Panama Canal route to Europe for wheat has proved successful, and it is anticipated that the movement of Canadian wheat through the port will be at least forty cargoes during the winter season of 1921-1922. In July, 1921, the first shipment of chilled meat ever sent to Europe from British Columbia left Vancouver for Great Britain by the Panama route, and other vessels took cargoes of apples and of canned salmon, commodities which have hitherto been shipped across the continent by rail.

Vancouver's manufacturing industries included in 1918 some 675 plants, capitalised at \$98,434,309 and employing 18,733 persons at wages or salaries aggregating \$21,281,962, the products turned out amounting in value to \$87,786,041 and consisting mainly of lumber and wood products, canned fish, structural steel and steel ships, sugar, etc.

The city of Victoria, on Vancouver Island, has a population of 38,775, and is the capital of the Province and a growing port, as well as one of the most beautiful places on the Pacific coast. A large dry dock, 1,150 feet long, is under construction at Esquimalt, near by, and there are important shipbuilding industries (including Yarrows, Ltd.) as well as factories for the manufacture of biscuits, boats, carriages, furniture, machinery, soap, canned goods, tents, paints, etc.

Prince Rupert, the terminal port of the Grand Trunk Pacific section of the Canadian National system, is a place of about 8,000 people in Northern British Columbia, which will attain considerable importance as that part of the Province develops and enters into connections with Far Eastern and other overseas markets. The port has a 20,000-ton floating dry dock and an important shipbuilding yard, as well as lumber mills, cold storage plant, and other industries.

New Westminster, near the mouth of the Fraser River, is an important terminal served by several lines of railway, and has a splendid harbour, which is being developed at a cost of \$2,000,000 for the Pacific trade. It is the centre of numerous industries, having an output in 1917 worth \$5,810,796, and is a market town for a flourishing fruit-growing and lumbering district.

Most of the remaining business centres in the Province are small towns, situated in fruit-growing, lumbering and mining valleys, which are the markets and distributing points for those districts. Possibly the best known of these centres are Armstrong (Okanagan Valley), Chilliwack (on the Fraser River, seventy miles from Vancouver), Cranbrook (in the Kootenay Valley),

Cumberland (a mining town on Vancouver Island), Fernie (a coal-mining centre in the Crow's Nest Pass field), Grand Forks (a copper-smelting centre), Kamloops (at junction of north and south branches of the Thompson River), Kelowna (in the Okanagan district), Ladysmith (a coal-mining town on Vancouver Island), Nanaimo (another Vancouver Island colliery town), Nelson (on Kootenay Lake, a mining, lumbering and fruit-growing centre), Penticton (a fruit-growing and lumbering centre on the Okanagan Lake), Revelstoke (a mining and tourist centre on the Columbia River), Vernon (near the Okanagan Lake, the commercial centre of the Okanagan district).

The **YUKON TERRITORY**, which has a land area of 206,427 square miles and a population of less than 9,000, has about 60,000 square miles suitable for agriculture, of which of course only a very small proportion is at present under crop, the principal industries of the people being mining for silver, gold and copper, fur-trapping and fox-farming. The town of Dawson is the centre of government. Mayo, the new silver camp on the Stewart River, is 250 miles from Dawson by river and 148 overland. The Guggenheims are working on twenty-two silver claims. The ore is said to be rich, running from 800 oz. to 40,000 oz. to the ton, some of it looking more like solid silver than silver ore. Work carried on, however, has proved the ore to a present depth of 600 feet, and getting richer with increasing depths.

The immense area of the **NORTH-WEST TERRITORIES**, representing 1,207,926 square miles, has a known population less than 20,000 in number, its resources consisting of enormous undeveloped deposits of gold, copper, lead, zinc and iron ores, as well as coal, gypsum, salt, oil and gas. The oil-bearing area is believed to be one of the largest in the world. A great volume of standing pulpwood is also found in the Mackenzie River

basin, fish are found in the northern lakes and rivers, and furs worth \$10,000,000 are obtained annually, including those of the beaver, musk rat, lynx, fox, otter and mink. Ranching of caribou, reindeer and musk ox for wool, meat, milk and hides has been begun in various parts; labour is supplied by Indians, and the abundant vegetation suitable for these animals affords a brilliant prospect for the new industry during the coming decade as meat supplies available from other sources gradually become inadequate to the rapidly growing world demand.

Canada's Imports by Provinces, 1920-1921.

	\$
Ontario	602,737,014
Quebec	362,495,158
British Columbia	81,615,288
Manitoba	64,823,482
New Brunswick	41,939,560
Nova Scotia	38,823,401
Alberta	24,227,312
Saskatchewan	21,716,892
Prince Edward Island	1,248,526
Yukon Territory	498,423
Total	<u>\$1,240,125,056</u>

CHAPTER V

CANADA'S VAST IMPORT TRADE

THE purchasing power of the 8,714,103 people constituting the population of the Dominion of Canada is, in view of the enormous resources and ever-expanding production of the country, obviously not to be compared with that of the older countries of the world, and particularly those of Europe which have suffered so much from the ravages of the recent war. A population upon which so large a proportion of the world's industrial workers depends for foodstuffs and raw materials of every description is a constant and an increasing market for finished products of high quality, even when the fact is carefully weighed that in recent years the domestic industries have grown considerably in importance. The total external trade of Canada during the calendar year 1920 was worth \$2,639,726,135, imports representing \$1,336,921,021, and exports \$1,302,805,114. Of the import trade of Canada, goods worth \$231,479,294 came from the United Kingdom, an enormous increase over the total for 1918, amounting to \$72,884,330, which is accounted for of course by the vigorous efforts made since the Armistice to restock the shelves emptied by the comparative isolation of Canada during the war from European sources of supply. The United States sent goods into Canada worth \$921,625,825, as compared with \$741,339,427, a formidable total which the exchange situation prevailing between the two North American countries should do much to diminish to the advantage of British competitors. Much of this import trade from the United States consists of semi-manufactured articles, constituting the raw material of

some Canadian industries, or of parts intended for assembly in the Canadian branches of American factories; much of it is represented by goods which reach Canada through American importers instead of by direct shipment to Canadian ports, and this trade is likely to be very largely diverted into direct channels as the services of the Canadian Government Merchant Marine to foreign ports continue to develop and to become popular. The fact, however, must not be overlooked that geographical considerations, the immense use of advertising, and the similarity of taste in many directions, give the American firm an advantage which may perhaps never be entirely upset, although there has at no time been a better opportunity than at the present time for British firms to secure the Canadian market in such goods as are common to both countries, or which can be produced in the United Kingdom at competitive prices owing to the tariff preference and the exchange situation. Canada's imports from countries other than the United Kingdom and the United States, while not negligible in bulk, are mainly of raw materials and tropical foodstuffs, although France secured sales worth \$20,000,000 in 1920, and Japanese products worth \$13,861,041 were also imported. The following tables, which show the principal articles imported into Canada for home consumption during the twelve months ended June 30th, 1919, 1920 and 1921 respectively, are of interest as general information, but firms seeking detailed particulars respecting the present trade in their own products, and concerning the possibility of securing business at the present time, will experience little difficulty in confirming the hints which will follow later and in obtaining information in greater detail along these lines from the various agencies set out in the next chapter of this book.

The fact that there is a large importation into Canada of any particular class of commodity does not of itself indicate that British manufacturers may expect to secure a large volume of trade in the articles concerned,

Analysis of Canadian Import Trade (by Countries).

	Twelve Months ended June,		
	1919.	1920.	1921.
	\$	\$	\$
United Kingdom	75,088,526	177,848,702	176,576,367
Australia	4,956,807	1,356,071	881,701
Bermuda	59,463	58,256	90,601
British East Indies	14,103,080	18,569,456	11,571,246
British Guiana	7,335,218	7,135,144	10,184,677
British South Africa	898,318	732,838	107,763
British West Africa	74,707	183,703	32,139
British West Indies	8,339,002	13,577,057	11,541,762
Hong Kong	1,814,207	4,524,030	2,522,848
Newfoundland	2,940,892	2,635,160	2,345,589
New Zealand	7,868,841	3,782,957	3,208,614
Other British Empire	348,436	1,386,961	2,444,634
Argentine Republic	1,043,988	4,179,133	1,857,837
Belgium	8,399	2,246,345	4,377,255
Brazil	1,240,325	2,532,820	1,660,703
China	1,340,244	1,654,535	1,689,041
Cuba	4,378,918	27,905,722	24,200,669
France	4,121,547	15,896,703	16,419,070
Germany	1,444	292,478	1,822,872
Greece	579	951,095	780,008
Italy	467,887	1,486,040	1,365,076
Japan	13,013,476	15,012,138	9,528,305
Mexico	857,438	2,568,460	2,598,902
Netherlands	686,435	2,935,888	4,126,691
Norway	37,647	667,629	457,337
Roumania	—	—	688
Sweden	133,843	396,719	545,403
Switzerland	1,840,168	12,050,595	11,278,255
United States	696,319,538	860,509,487	766,393,077
Other foreign countries	20,184,043	27,140,255	14,702,546
Total imports	869,503,416	1,210,216,377	1,085,311,676

as considerations of freight rates, suitability of British goods to the market, the absence of a British home market justifying large investments of capital in manufacturing special types of goods, rates of Customs

*Principal Articles Imported for
Consumption.*

	Twelve Months ended June,		
	1919.	1920.	1921.
	\$	\$	\$
Animals, living . . .	1,921,984	2,562,212	3,055,211
Articles for army and navy . . .	32,719,707	775,933	254,738
Asphaltum and asphalt	391,615	524,475	666,054
Books and printed matter . . .	8,366,721	11,960,320	13,362,600
Breadstuffs . . .	22,069,207	29,584,377	17,248,779
Bricks, clays and tiles .	3,278,611	2,700,276	4,142,619
Butter . . .	762,384	254,580	2,096,599
Cheese . . .	59,021	252,743	263,793
Chemicals . . .	27,420,613	22,879,763	21,357,496
Clocks and watches .	2,469,203	3,473,450	3,478,621
Coal—			
Anthracite . . .	26,598,034	33,060,688	42,095,234
Bituminous . . .	38,959,277	30,552,479	72,520,602
Cocoa and chocolate .	4,053,967	7,632,988	2,866,880
Coffee . . .	2,038,098	6,062,836	3,402,712
Cotton . . .	65,601,515	112,513,303	73,497,430
Curtains and shams .	367,475	583,263	522,456
Earthenware and china-ware . . .	2,452,252	4,337,986	5,869,476
Eggs . . .	594,793	3,173,393	2,189,727
Fish . . .	2,421,346	4,041,005	3,193,074
Flax, hemp and jute .	13,272,125	18,509,483	10,988,654
Furs . . .	4,710,695	13,842,793	5,209,452
Hides and skins . . .	6,755,157	25,661,164	6,358,944
Jewellery . . .	707,913	1,353,918	1,022,028
Lard . . .	320,003	2,882,248	1,934,920
Leather . . .	10,975,154	18,352,513	7,557,084
Meats . . .	11,891,335	16,661,612	11,072,673
Metals—			
Brass . . .	4,686,845	5,054,848	5,606,202
Copper . . .	5,839,809	10,063,846	7,720,439
Gold and silver .	274,421	886,466	959,456
Iron and steel .	150,385,346	168,583,337	179,438,902
Lead . . .	706,378	1,565,229	1,601,454
Tin . . .	13,249,031	12,926,267	10,867,417
Zinc . . .	936,757	702,787	598,890

	Twelve Months ended June,		
	1919.	1920.	1921.
Principal Imports— <i>continued.</i>	\$	\$	\$
Musical instruments	2,923,092	4,493,948	3,151,647
Paints, colours and varnish	3,213,052	4,855,346	3,992,478
Paper	8,900,304	11,252,696	12,334,550
Pickles and sauces	408,973	741,848	630,007
Ribbons	1,865,902	3,899,173	3,084,117
Rubber	11,205,936	20,583,249	11,632,300
Seeds	2,041,414	5,437,348	3,756,297
Settlers' effects	6,367,420	10,887,690	10,236,774
Silk	21,221,174	41,438,783	22,858,412
Soap	998,836	1,833,113	1,172,290
Stone, marble and slate	2,251,618	3,714,915	4,533,896
Sugar and molasses	44,210,536	85,481,139	76,107,228
Tea	4,079,502	10,309,146	8,080,514
Tobacco	12,352,662	16,097,946	11,538,360
Tobacco pipes, etc.	812,840	1,055,933	1,330,166
Vegetables	4,017,056	6,030,894	5,826,019
Vehicles	20,950,575	35,247,004	24,580,579
Vessels	4,541,733	5,645,842	2,345,701
Wood	18,729,295	24,393,749	27,750,059
Wool	41,778,930	79,705,514	49,223,845
Total principal and other articles imported	869,503,416	1,210,216,377	1,085,311,676

duty on imported goods enabling successful competition by the domestic producer, may operate in larger or smaller measure to render a development or the extension of exports difficult of realisation.

United Kingdom manufacturers and merchants will, however, find it possible to obtain a great deal of valuable information in regard to the market for the lines in which they are interested from the various reports sent to the Department of Overseas Trade (Development and Intelligence) in London by the British Trade Commissioners in Canada, and published either in the

Canadian Imports of Textiles (Fiscal Years ended March 31st).

Classification.	Total Imports for Consumption (Merchandise).			Imports from United Kingdom.		Imports from United States.	
	1919.	1920.	1921.	1920.	1921.	1920.	1921.
	\$	\$	\$	\$	\$	\$	\$
Cotton—							
Raw	34,008,824	33,854,457	28,541,989	—	156	33,854,457	28,164,088
Yarns and thread	6,038,049	6,258,819	10,491,347	2,655,112	6,455,698	3,584,860	3,933,620
Fabrics—							
Duck over 8 oz. per square yard	2,199,753	3,838,711	3,958,944	148,761	366,587	3,689,882	3,579,313
Printed, dyed or coloured	12,157,316	18,238,179	21,952,640	7,201,336	12,104,130	10,793,967	8,255,367
Grey, unbleached	1,082,826	2,168,676	2,948,302	343,122	1,445,736	1,845,554	1,486,862
White or bleached	2,921,405	3,908,548	4,167,055	869,886	1,682,057	2,565,657	2,382,419
Damask of cotton, table cloths, etc.	845,844	825,707	1,179,604	634,091	968,846	85,746	50,754
Towelling in the web	383,327	721,096	1,129,157	657,049	1,091,425	61,380	37,268
Towels	602,139	1,001,733	1,604,804	647,179	1,311,973	400,974	285,995
Velvets and plush	2,453,167	1,623,408	1,559,783	965,479	1,206,731	582,078	320,246
Other	2,182,425	4,600,863	7,204,764	1,705,621	3,880,367	2,921,793	3,253,417
Embroideries	600,397	844,152	1,553,090	76,803	164,664	403,174	259,579
Lace	2,292,350	3,064,391	4,632,876	1,697,519	2,952,597	845,153	757,963
Wearing apparel—							
Socks and stockings	1,431,383	1,762,407	1,953,727	86,097	221,008	1,620,238	807,578
Other	2,781,018	3,543,341	3,856,112	437,695	1,120,188	2,893,814	2,434,050
Handkerchiefs	1,098,831	1,114,525	1,763,255	845,588	1,388,073	175,460	110,745
Other manufactures of cotton	2,181,450	2,256,971	3,119,145	307,902	741,636	1,895,185	2,267,125
Flax, hemp and jute—							
Hemp, dressed or undressed	1,208,438	749,543	456,646	20,811	4	698,041	281,146
Jute or hemp yarn, for weaving	702,186	1,445,775	1,331,563	617,598	776,800	740,688	444,987
Linen fabrics	1,951,387	2,484,877	3,614,150	2,315,868	3,378,517	100,445	55,484
Jute cloth or canvas	8,685,883	9,342,561	7,005,189	4,264,935	2,921,790	1,355,275	304,549
Other manufactures of flax, hemp and jute	1,245,994	1,901,080	2,518,571	996,255	1,472,243	838,463	943,250

Board of Trade Journal or in confidential bulletins for free distribution to interested parties making direct application for them. Much of the information given below regarding specific types of goods for which it is believed that the Dominion will afford a market as soon as purchasing on a normal scale recommences across the Atlantic has been obtained from the reports to which reference is made above, but readers are recommended to procure for careful study the complete Report for 1921 of the British Senior Trade Commissioner in Canada (H.M. Stationery Office. Price 2s. 3d.).

In a booklet of this kind, any overloading of the text by statistical matter is perhaps to be deprecated, but the importance of the Canadian market to British exporters of textiles, iron and steel manufactures (including machinery), metals, electrical goods and chemical products may possibly justify the inclusion of the accompanying tables showing the import trade in these commodities during the past three fiscal years. These tables show not only total imports, but indicate the proportion of the total which was derived from the United Kingdom and the United States respectively. Exporters will, therefore, find data upon which to base inquiries with a view to eliciting to what extent the exchange situation in the Dominion resulting from the new American tariffs is likely to create an opportunity for the replacement by British goods of American manufactures formerly sold in Canada. The figures in each case are for the fiscal years ended March 31st, and not the later ones for the twelve months ended June 30th as set forth in the tables on pages 131—133.

Taking the various textile manufactures separately, it may be remarked that there is a good market in Canada for COTTON PRINT GOODS, now mainly supplied from the United States. British manufacturers, of course, have no peers in the quality trade, but for the Canadian market more consideration should be given

than at present to design and price than to quality, as long wear is not looked for, and there is extensive business to be had in cheap materials with high-price designs printed on them.

COTTON BLANKETS are practically all imported from the United States, and as these are in favour in Canada owing to the universal custom of heating houses throughout from a central furnace, British firms should make an effort to supply a demand likely to be constant and growing.

There is room for further development in COTTON SHIRTS, SOCKS and STOCKINGS, UNDERSHIRTS, DRAWERS and COMBINATIONS, provided that designs correspond with Canadian styles; the bulk of the domestic productions in these lines are manufactured with English and Scottish materials.

Foreign competition is to be looked for in COTTON PIECE GOODS, and quilts, towels, towellings and cotton underwear are mainly imported at present from the United States.

White, cream and coloured COTTON LACE is mainly imported from Switzerland, but the trade deserves careful consideration from British manufacturers.

FLAX, HEMP AND JUTE.—Competition is to be expected before long in the various branches of the LINEN trade, as flax fibre of excellent quality is produced in the Dominion, and well-organised efforts are being made to promote the various manufacturing processes dependent upon the flax plant.

The enormous importation into Canada of BINDER TWINE is almost all of United States manufacture, and it is surprising that British firms, who do well in other branches of the rope and twine industry, do not make a more sustained effort to secure at least a portion of the business.

There seems to be room for a further development of British imports of SILK MANUFACTURES of various kinds, particularly in piece goods. Silk fabrics are

largely imported from both Japan and Switzerland, but British exports to Canada of all manufactured silk products are capable of considerable development provided that the requirements of the market are carefully gone into and met so far as possible. Wholesale and retail trade buyers, many of whom can be met periodically in London, would gladly transfer orders to British firms who were in a position to supply the precise description of article for which their firms report a demand. This applies more particularly, perhaps, to hose, half-hose, underwear, shirts, blouses and ribbons, but care should be taken not only with the goods themselves but in the stylish and convenient packing of these into boxes for display on store-shelves. Silk neckties sold in Canada are mainly of Swiss origin, because the designs put up by British firms do not comply with local requirements.

So far as WOOLLEN MANUFACTURES are concerned, the United Kingdom may rely upon retaining the bulk of the trade for some considerable time, although increased domestic and foreign competition must be watched and countered, and firms must therefore be prepared to adapt their business methods to the special requirements of the market as these are brought to their attention.

In connection with MEN'S WEAR, United Kingdom firms frequently fail to supply the particular styles and patterns required by the Canadian market. Special attention should be paid to the weights of suitings and overcoatings, as suits sent out for sale in the Dominion are often too heavy for wear in centrally-heated houses, and overcoatings, on the contrary, too light for the conditions experienced in most parts of Canada during the winter. Light-weight suits are worn throughout the year, but overcoats should be anything from 32 to 48 lb. in weight.

British firms should devote special consideration to WOMEN'S and CHILDREN'S WOOLLEN OUTSIDE GARMENTS (KNIT AND WOVEN), for which trade English

designs are not so popular as the American. Cloakings need study as well, and a personal investigation of the market for such goods has much to recommend it. In knitted woollen goods Canada offers a great market by reason of its climate, in spite of the home production, which is important in this particular branch of the industry.

The new Marking Regulations, which are to come into force on December 31st, 1921, are designed to benefit British trade in textile and other lines, and although there are many difficulties in complying with them, firms should bear in mind that the authorities desire the ultimate consumer to have the opportunity of discriminating between Canadian, British and foreign goods when purchasing at the retail store. The packing of goods should receive careful study in order to enlist the co-operation of "sales clerks," who prefer to handle goods put up in separate packages. Labelling for the Quebec trade should be in the French language.

HATS AND CAPS.—There is still ample room for the expansion of British trade in straw hats of the styles acceptable to the market, although the United Kingdom is getting the main part of the business at the present time. In felt hats there is well-advertised competition from Italy.

The trade in hat-making materials is well worthy of study, as hatters' bands, sweats, plush, etc., are mainly imported by the domestic manufacturers rather than made in their own works.

The United States have managed to secure much of the trade in tweed hats and caps, and have popularised their particular styles, which must now be copied by British firms desirous of recapturing this business.

In **CARPETS** the United Kingdom still retains the premier position, and efforts must be mainly in the direction of maintaining ground and forestalling domestic and foreign competition.

While **LINOLEUM** is not mentioned in the foregoing

Canadian Imports of Iron and Steel Manufactures (Fiscal Years ended March 31st).

Classification.	Total Imports for Consumption (Merchandise).			Imports from United Kingdom.		Imports from United States.	
	1919.	1920.	1921.	1920.	1921.	1920.	1921.
	\$	\$	\$	\$	\$	\$	\$
Iron ore	5,932,001	4,601,716	5,995,038	—	—	4,093,839	5,038,900
Agricultural implements	8,995,011	6,878,752	11,759,709	51,127	145,846	6,792,245	11,431,444
Boilers, engines, pumps and wind- mills—							
Engines, gas and gasoline	6,379,593	11,406,793	7,646,314	40,979	83,701	11,363,079	7,562,493
Engines for farm purposes	16,816,229	8,604,735	14,478,917	15	6,276	8,604,720	14,472,641
Locomotives and parts	721,300	662,573	679,252	1,575	1,392	660,998	677,860
Pumps, power, and parts of	935,802	948,074	1,255,244	37,361	52,586	910,713	1,201,506
Other boilers, engines, pumps, etc.	986,839	1,244,176	1,740,676	78,367	432,699	1,165,809	1,305,938
Castings	1,948,584	2,001,765	2,383,662	43,336	46,713	1,958,311	2,336,218
Chains	601,732	1,008,890	1,304,654	709,792	308,571	709,278	994,189
Cutlery and hardware	3,740,876	4,309,529	5,800,867	819,430	1,938,585	3,395,496	3,315,885
Firearms	179,800	687,077	726,073	27,520	43,694	657,073	638,511
Machinery (except agricultural)—							
Sewing machines and parts	698,400	1,092,083	1,137,418	86,528	146,731	1,006,386	990,687
Other household machinery	406,648	824,936	835,448	—	91	824,936	835,357
Mining and metallurgical	1,079,392	1,427,587	1,051,754	35,536	86,273	1,391,176	1,559,761
Office or business	1,465,500	2,192,037	2,278,967	108	3,046	2,191,851	2,273,741
Printing and bookbinding	1,864,262	2,387,271	3,739,089	1,912	15,804	2,385,359	3,716,246
Paper and pulp mill	762,193	1,321,939	2,487,993	280,604	690,110	1,041,335	1,711,795
Textile	2,291,596	3,211,766	6,199,562	255,366	1,245,989	2,956,490	4,932,506
Other machinery	18,919,653	23,337,588	26,312,107	746,506	1,357,827	22,489,510	24,746,812
Rolling mill products—							
Band and hoop	13,537,710	8,692,474	17,117,035	938,977	2,398,285	7,572,856	14,646,237
Bars and rails	4,085,742	2,673,196	6,776,714	124	12,364	2,673,072	6,764,043
Plates and sheets—							
Boiler plate	1,221,629	527,544	1,040,554	1,411	—	526,133	1,040,554

Canada plates	745,016	917,207	1,243,108	15,485	89,449	901,722	1,153,659
Tinned plates	11,274,340	6,674,877	8,902,463	118,661	297,317	6,556,216	8,160,139
Galvanised	809,109	1,083,423	3,575,357	163,883	982,085	919,540	2,593,272
Skelp, for pipe	4,430,785	4,330,586	6,052,793	—	—	4,330,586	6,052,793
Other plates and sheets	6,751,142	5,283,570	10,466,038	116,256	629,930	5,146,724	9,833,558
Rods	2,722,941	1,601,750	1,744,065	—	—	1,601,750	1,744,065
Structural iron	6,387,072	4,749,506	10,528,868	4,062	47,544	4,745,444	10,479,324
Tubing and piping	3,880,794	3,052,438	5,015,063	130,812	254,954	2,921,626	4,754,709
Other rolling mill products	7,378,884	3,842,794	3,142,497	19,277	44,324	3,821,882	3,082,105
Scrap iron or steel	932,747	449,083	2,419,194	105	2,000	446,840	2,405,913
Smelted products—							
Ferro-silicon and ferro-man- ganese	4,312,511	402,157	1,457,998	212,013	656,578	190,144	722,285
Pig iron	1,979,302	827,608	2,311,184	49,421	24,157	778,187	2,287,027
Other smelted products	298,816	479,378	813,871	5,308	72,922	474,070	740,949
Springs	407,583	739,152	559,454	791	2,329	738,353	557,121
Stamped and enamelled products	2,152,838	1,016,777	1,041,515	66,244	100,209	947,306	937,027
Tools and hand implements	1,538,859	2,050,286	2,562,029	95,466	199,366	1,942,036	2,315,480
Vehicles—							
Automobiles, freight	2,274,748	3,831,084	3,578,038	19,945	100,325	3,811,139	3,476,163
Automobiles, passenger	5,326,510	11,204,461	8,399,537	8,134	53,781	11,196,327	8,339,704
Railway cars, all kinds	2,953,444	3,306,997	2,243,083	11,102	32,917	3,205,895	2,210,166
Other vehicles	7,151,514	13,555,378	12,508,139	71,753	140,554	13,483,591	12,136,757
Wire—							
Barbed fencing	1,080,458	2,056,092	1,934,159	—	—	2,056,092	1,934,159
Other	4,428,939	3,787,531	6,084,126	956,769	2,021,886	2,829,914	4,047,664
Other iron and steel	18,520,533	21,033,940	25,605,827	826,006	1,928,875	20,155,647	23,528,602
Total iron and its products	192,527,377	186,319,876	245,626,453	6,637,067	16,698,085	178,661,606	226,862,465

tables, it may be noted here that the position held by the United Kingdom is distinctly strong in the more expensive grades; there is, however, important domestic competition. British firms, if they were willing, could no doubt secure business in the cheaper grades with felt backs. There is also room for stronger British competition in oil baizes and enamelled cloths for shelf and table covering, most of which are imported from the United States.

AGRICULTURAL IMPLEMENTS.—It is most regrettable that British manufacturers whose machines are known in almost every corner of the world have apparently almost entirely neglected the Canadian market, and particularly the rapidly-growing agricultural field of Western Canada, where large numbers of farmers are of British birth or descent, and would, for this reason, exercise a strong prejudice in favour of British-made implements and machinery of a type suitable to their requirements. Every description of rural occupation is followed in one part of Canada or another, and the immense realised and prospective growth of agriculture in the Dominion should justify the most thorough investigation by the principals of the great British manufacturing concerns before a great opportunity is finally lost to them by the greater enterprise and adaptability of their Canadian and United States competitors in this field. In Mr. L. B. Beale's "Report on the Market for Agricultural Implements," obtainable from the Department of Overseas Trade, manufacturers will find valuable hints regarding the trade available in the prairie Provinces, and this should be very carefully studied.

There is a very important market in this vast grain-growing area for farm tractors costing less than \$1,400 at the point of delivery, and it does not seem unlikely that competition by the largest of the British combines of manufacturers could be carried on successfully even in spite of the longer distance to the head of the Lakes from Great Britain than from shipping points in the

United States. During 1920, 10,279 tractors were sold in Western Canada as follows :—Manitoba, 3,671 ; Saskatchewan, 4,229 ; Alberta, 2,379. The numbers of tractors sold in the West during the past four years were as follows :—1917, 5,000 ; 1918, 7,500 ; 1919, 9,000 ; 1920, 10,279. It is estimated that there are 33,000 tractors now in use, and that sales for 1921 probably reached the 7,500 mark.

CUTLERY.—In most descriptions of cutlery there is little doubt that the United Kingdom is well able to hold her own, provided that prompt delivery is assured from stocks held in the country. It is, however, probable that more careful study of the tastes of the people would be advantageous to British firms, even in the case of those already doing a good trade, as it would tend to forestall domestic and foreign competition. Manufacturers of the cheaper grades of cutlery should also make a more sustained effort to supply the Canadian market, which is becoming more and more dependent for these lines upon Japan. Practically the whole of the imports of scissors come from foreign countries, such as the United States and Germany.

HARDWARE.—The Canadian market for the various descriptions of light and heavy hardware is, of course, a very large one, which is well catered for by domestic manufacturers as well as by United States firms producing articles peculiar to North America. There seems, however, every probability that a thorough study of the market by practical men sent out by British firms, having knowledge of the manufacturing as well as the sales side of the business, and with an eye to the ultimate use of the goods by purchasers whose requirements are not precisely those of people in the United Kingdom, would result in an improvement of sales by such concerns, as Canadian importers often find it impossible to fill their requirements in the United Kingdom, and have, therefore, to turn to American manufacturers for the supplies with which to meet their

demand. Among the lines more likely to be obtainable from the United Kingdom are probably :—

Brass shelf hardware.

Builders' hardware.

Galvanised sheets.

Carpenters' tools.

Machinists' tools.

Chains.

An investigation of the market in person by the works manager of a British plant, if this could be arranged, might result in the discovery that very slight alterations to the manufacturing plant, moulds, dies, etc., would suffice to enable the firm to secure Canadian business at present in the hands of United States manufacturers.

MACHINERY.—It is, of course, not easy to predict a large development in sales in the Dominion of British-made machinery, although the market is an enormous one, far out of proportion to Canada's population of 8,714,103 people. Sales of machinery depend very largely upon early knowledge by the manufacturers of pending calls for tenders, and these have often to be sent in at what is—for British firms—very short notice. It is, therefore, essential that United Kingdom engineering firms desiring business in the Dominion should maintain on the spot a thoroughly adequate system of technical representation, either on their own account or in co-operation with other firms whose interests are not antagonistic. In their Canadian offices, well equipped with correspondents in the various business centres throughout the Dominion, they should have responsible technical men, capable of preparing and submitting tenders for machinery without the delay of referring matters of detail to the head office. They should have at their disposal warehouses with ample stocks of spare parts and replacements which can be despatched to any point in Canada upon receipt of telephone or telegraph inquiries, just

as is done by their competitors in the United States. An organisation of this kind is one which, of course, not every British engineering firm can afford to set up on its own responsibility, but much could, no doubt, be done by special export organisations or by several companies working for this purpose in co-operation. It is calculated that there are in Canada some 700,000 workers engaged in manufacturing processes, and much of the machinery and equipment needed by them is not yet made on any considerable scale in the Dominion, but has to be imported. Municipal authorities, mining and hydro-electric enterprises are also large importers of engineering supplies and machinery.

MACHINE TOOLS.—For reasons similar to those indicated above, the Canadian market for machine tools is also a very large one, and could be supplied far more than at present from the United Kingdom. Occasional efforts to secure business have certainly been made by many British firms, and at the present time one important concern is engaged, in co-operation with several others, in building up an important business. Needless to state, spare parts on the spot are an absolute essential in this business, and a study of the market by technical as distinct from the merely commercial officers of the firm is likely to result in an enhanced capacity to produce goods suitable to the special requirements of Canadian purchasers. Tools used in Canada are for the most part "right-handed," like the American, and the Canadian mechanic—who is often American born or American trained—does not take to the machine tool supplied for the English market. English-made tools are often too substantially made for Canadian requirements, and are, therefore, open to the objection that, long before they are fit for the scrap-heap, improved tools are on the market the use of which would tend—if purchased then—greatly to increase production, and in this way largely to nullify any advantage advertised by the British firm in respect of the superior quality and durability of their produc-

tions. The criticism is often heard that British-made tools are heavy in construction from the Canadian point of view. Objections of this kind, met on the spot by the visiting works manager of a British firm who was able to see his firm's tools actually in use in a Canadian workshop, would be most valuable aids to him in devising improved methods on his return for the particular needs of the Canadian market.

ROLLING MILL PRODUCTS.—While there is a very large importation into Canada of products coming under this category, these probably consist for the most part of iron and steel brought into the Dominion for assembly into manufactured products by the Canadian plants of United States firms, and it is, therefore, not clear that any great inroad into the American trade in these goods could be made by British exporters.

With regard to TINPLATE, however, there is little doubt that the market is a large and growing one, and that the Welsh manufacturers can successfully compete with American producers if they can assure low prices, prompt deliveries and can maintain a good finish to their productions.

FERRO-ALLOYS.—Prompt delivery of the various products included under this heading is necessary in order to maintain successful competition with American producers, and while ferro-silicon is produced in the Dominion, there would be a big market for ferro-tungsten if the British product could be made better known in the trade.

WIRE.—British firms should be able to do better than at present in the market for barbed wire, at present mainly supplied by American firms, but they remain supreme in wire rope, for which the British article is generally specified in advertised contracts.

METALS.—The demand for metals has been very slack throughout 1921, owing to the concentration of large stocks in Canada, but it is anticipated that with the trade revival the prospect for British competition will improve.

In LEAD, particularly, British firms should find it

Canadian Imports of Non-Ferrous Metals and their Products, including Electric and Gas Apparatus (Fiscal Years ended March 31st).

Classification.	Total Imports for Consumption (Merchandise).			Imports from United Kingdom.		Imports from United States.	
	1919.	1920.	1921.	1920.	1921.	1920.	1921.
NON-FERROUS METALS—							
Aluminum and its products . .	2,836,122	2,747,385	3,252,236	76,467	205,801	2,660,542	3,013,971
Brass and its products . .	4,557,140	4,595,756	6,098,647	242,547	979,675	4,304,931	5,055,178
Copper—							
Bars and rods . .	4,014,210	6,037,473	5,724,064	—	7,127	6,037,473	5,716,937
Blocks, pigs, ingots . .	886,395	1,021,208	1,396,327	—	—	1,021,208	1,396,327
Other . .	1,097,117	1,509,354	2,492,135	53,855	390,513	1,388,272	2,019,932
Lead and its products . .	948,691	937,312	2,324,248	140,791	1,493,232	542,357	377,248
Nickel, cobalt and their pro- ducts . .	1,586,442	2,276,815	2,629,926	52,554	141,908	2,213,220	2,455,871
Precious metals and their pro- ducts . .	3,593,165	5,435,704	2,753,571	226,869	665,280	5,192,785	2,036,554
Tin and its products . .	2,153,396	3,284,669	2,962,644	2,116,792	1,703,894	931,422	1,106,391
Zinc and its products . .	1,227,436	835,596	584,474	1,579	72,978	833,965	457,693
Other non-ferrous metal pro- ducts—							
Clocks and watches . .	2,448,449	3,126,267	3,922,773	27,043	59,713	2,134,414	2,104,553
Electric and gas apparatus . .	10,676,725	15,790,354	17,182,859	177,887	580,311	15,371,461	16,343,425
Printing materials . .	160,432	291,676	325,934	11,665	20,859	277,323	301,316
Other . .	5,463,711	4,244,344	3,903,314	211,158	359,604	3,958,820	3,483,226
Total non-ferrous metals . .	41,649,431	52,103,913	55,553,152	3,339,207	6,680,955	46,868,193	45,868,622

possible to develop satisfactory business with manufacturers of white lead for paint making.

The United Kingdom already controls the trade in TIN in and around Montreal, but trade in Ontario and westward is at present hindered by high freight rates.

JEWELLERY, SILVER PLATE AND ELECTRO PLATE.—The position of the United Kingdom in the Canadian jewellery trade is good, and Great Britain supplies about two-thirds of the imports of electro-plated ware. The trade in nickel-plated goods is, however, nearly all in the hands of American manufacturers, though it is believed that successful competition could be carried on by British firms willing to make a personal investigation of the market and to change their styles in certain cases to meet the local demand.

The particular items covering imports of **ELECTRIC APPARATUS** may be set forth in greater detail as under, and, in view of the great present and prospective growth in hydro-electric developments in the Dominion, should be of particular interest to British electrical and allied manufacturers, in spite of the fact that domestic production is carried on on a large scale, with a total output in 1919 worth some \$34,187,658 :—

	Twelve months ending March,		
	1919.	1920.	1921.
Electric batteries, primary—			
From United Kingdom . \$	—	332	20
United States . \$	—	124,501	64,701
Other countries . \$	—	—	62
Total . \$	—	124,833	64,783
Electric batteries, storage—			
From United Kingdom . No.	—	181	18
\$	—	4,245	470
United States . No.	—	97,742	89,323
\$	—	1,470,479	1,363,986
Other countries . No.	—	—	—
\$	—	—	—
Total . . No.	—	97,923	89,341
\$	—	1,474,724	1,364,456

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		Twelve months ending March,		
		1919.	1920.	1921.
Electric cooking and heating apparatus—				
From United Kingdom .	\$	—	1,009	1,948
United States .	\$	—	111,148	127,627
Other countries .	\$	—	—	—
Total .	\$	—	112,157	129,575
Electric dynamos and generators—				
From United Kingdom .	\$	—	4,972	93,766
United States .	\$	—	1,039,067	1,227,398
Other countries .	\$	—	—	2,500
Total .	\$	—	1,044,039	1,323,664
Electric light fixtures and parts thereof of metal—				
From United Kingdom .	\$	1,803	3,846	6,377
United States .	\$	267,873	698,879	650,548
Japan .	\$	2,952	15,124	3,487
Netherlands .	\$	—	12,347	—
Other countries .	\$	148	1,824	8,063
Total .	\$	272,776	732,020	668,475
Electric meters—				
From United Kingdom .	\$	—	37,222	24,620
United States .	\$	—	243,252	352,348
Other countries .	\$	—	394	—
Total .	\$	—	280,868	376,968
Lamps, electric arc—				
From United Kingdom .	\$	—	—	73
United States .	\$	—	9,719	28,669
Other countries .	\$	—	—	—
Total .	\$	—	9,719	28,742
Lamps, electric incandescent—				
From United Kingdom .	No.	—	—	52,045
	\$	—	1,479	8,952
United States .	No.	—	—	3,372,608
	\$	—	1,153,407	970,163
Japan .	No.	—	—	777,207
	\$	—	41,316	58,770
Netherlands .	No.	—	—	832,590
	\$	—	128,591	141,536
Other countries .	No.	—	—	13,019
	\$	—	504	5,083
Total .	No.	—	—	5,047,469
	\$	—	1,325,297	1,184,504

	Twelve months ending March.		
	1919.	1920.	1921.
Incandescent lamp bulbs and glass tubing for use in the manufacture of incandescent lamps, and mantle stockings for gas light—			
From United Kingdom . . \$	45	—	—
United States . . \$	198,382	—	—
Other countries . . \$	818	—	—
Total . . \$	199,245	—	—
Motors, electric—			
From United Kingdom . . \$	—	18,342	41,021
United States . . \$	—	1,956,639	2,578,807
Sweden . . \$	—	1,697	8,906
Other countries . . \$	—	25	—
Total . . \$	—	1,976,703	2,628,734
Motors, generators and dynamos—			
From United Kingdom . . \$	32,305	—	—
United States . . \$	2,319,742	—	—
Other countries . . \$	1,675	—	—
Total . . \$	2,353,722	—	—
Sockets—			
From United Kingdom . . \$	—	28	606
United States . . \$	—	138,312	300,935
Japan . . \$	—	4,408	2,619
Other countries . . \$	—	—	—
Total . . \$	—	142,748	304,160
Telegraph instruments including wireless apparatus—			
From United Kingdom . . \$	—	9,849	40,672
United States . . \$	—	104,185	76,581
Other countries . . \$	—	—	4,045
Total . . \$	—	114,034	121,298
Telephone instruments—			
From United Kingdom . . \$	—	3,523	32,804
United States . . \$	—	649,994	889,553
Other countries . . \$	—	—	—
Total . . \$	—	653,517	922,357
Transformers—			
From United Kingdom . . \$	—	1,238	—
United States . . \$	—	123,118	167,427
Other countries . . \$	—	—	—
Total . . \$	—	124,356	167,427

	Twelve months ending March.		
	1910.	1920	1921.
Other electric apparatus, n.o.p., insulators of all kinds and sockets, etc., and electric galvanic batteries; telegraph and telephone instru- ments—			
From United Kingdom . . \$	55,232	—	—
United States . . \$	7,493,617	—	—
France . . . \$	1,984	—	—
Japan . . . \$	19,629	—	—
Sweden . . . \$	4,805	—	—
Other countries . . \$	407	—	—
Total . . . \$	7,575,674	—	—
Electric apparatus, n.o.p.—			
From United Kingdom . . \$	—	88,981	313,344
United States . . \$	—	7,311,499	7,296,540
France . . . \$	—	1,610	1,738
Japan . . . \$	—	15,800	15,262
Sweden . . . \$	—	16,270	4,928
Other countries . . \$	—	1,079	1,613
Total . . . \$	—	7,435,239	7,633,425

The recent incorporation of the English Electric Co. of Canada, Ltd., which has acquired an important plant at St. Catharine's, Ontario, in the Niagara Peninsula, is evidence that one large British concern has realised the present and latent possibilities of the Canadian market. The increasing use of electrical machinery in all industries concurrently with the steady development of Canada's rich heritage in water powers, the rapid extension and re-equipment of civic tramways and light railways, the equipment of the mercantile marine with electrical engines, the increasing use of electric appliances of all kinds in the home and on the farm, the enormous demand for motor accessories, all represent a demand worthy of careful study by British manufacturers in spite of the fact that the domestic electrical apparatus industry is of great and growing significance.

As most men engaged in the CHEMICAL TRADE are already well aware, Canada during the war experienced very great developments in most branches of her chemical industry, the shutting off for the period of hostilities of necessary supplies from European countries, as well as the urgent necessity for the production of explosives and other chemical products for war purposes, having immensely stimulated an industry which would in any case have made great advances owing to the possession by the Dominion of a rich variety of raw materials and a valuable source of industrial power in the hydro-electric energy obtained so cheaply from her many quick-flowing streams.

According to the census of industry for the year 1918 the total domestic output of drugs and chemicals amounted to \$38,252,587, the various plants engaged on the manufacture of these products having a total capitalisation amounting then to \$26,029,530, and employing 4,292 persons at wages or salaries aggregating \$5,872,947. The Dominion has, nevertheless, continued to be a considerable importer of chemicals and allied products, the total trade during the past three years having reached \$34,282,647 for 1918-1919 (much of it for war purposes), dropping to \$29,886,102 for the first complete "peace" year, 1919-1920, but rising in the next year to \$36,334,612. It is hardly surprising that, while the share of the United Kingdom in the Canadian chemical market has been gradually rising during the past three years (from \$3,397,095 in 1918-1919 to \$4,154,345 in 1919-1920, and to \$6,037,185 in 1920-1921), the bulk of the trade is held by the United States, "other countries" securing last year sales amounting to only \$3,509,531, as compared with \$1,877,457 in 1919-1920, and \$2,165,787 in 1918-1919. Imports of American-made chemical products, which amounted to \$28,719,765 in 1918-1919, reached only \$23,854,300 twelve months later, but rose last year to \$26,787,896. It is obvious, therefore, that in a market worth in the neighbourhood of £9,000,000 at current

Canadian Chemical Imports (Fiscal Years ended March 31st).

Classification.	Total Imports for Consumption (Merchandise).			Imports from United Kingdom.		Imports from United States.	
	1919.	1920.	1921.	1920.	1921.	1920.	1921.
CHEMICALS AND ALLIED PRODUCTS—							
Acids	975,757	1,054,345	892,197	\$ 474,767	\$ 404,358	\$ 534,117	\$ 459,690
Drugs and medicinal preparations	3,023,532	3,402,932	3,457,913	1,113,429	1,307,077	1,805,801	1,679,047
Dyeing and tanning materials	2,028,645	2,639,099	2,997,689	363,613	555,332	2,134,088	2,267,112
Aniline dyes	2,016,442	1,893,385	1,890,940	30,861	119,144	1,658,814	1,244,013
Logwood, etc., extract	531,987	1,090,736	1,142,937	115,645	143,765	871,489	936,683
Other dyeing and tanning articles	384,739	556,836	750,385	157,879	296,040	375,065	430,178
Explosives	941,516	1,122,057	1,420,374	19,211	41,725	1,101,181	1,370,429
Cellulose products	4,360,401	1,753,307	4,272,654	54,217	172,056	1,624,442	3,347,793
Fertilisers	3,422,510	3,821,880	4,251,620	222,210	509,128	3,541,145	3,513,581
Paints, pigments and varnishes	1,267,868	1,534,082	1,424,446	92,321	103,883	1,424,181	1,244,677
Soaps	458,874	1,096,104	1,202,585	132,543	94,487	528,854	470,763
Perfumery, cosmetics, etc.	6,582,532	5,876,196	7,400,430	575,318	858,222	5,095,301	6,280,060
Inorganic chemicals, n.o.p.	8,287,844	4,044,643	5,231,042	802,331	1,431,968	3,158,922	3,543,870
Other chemicals and allied products							
Total chemicals and allied products	34,282,647	29,886,102	36,334,612	4,154,345	6,037,185	23,854,300	26,787,896

rates of exchange, British goods have as their principal competitors those from the United States, sold under advantageous conditions so far as geographical proximity is concerned, but under the disadvantage of higher rates of duty and with an exchange situation favourable to British exporters and correspondingly unfavourable to American exporters of similar lines.

Details of the Canadian import trade in chemical products during the fiscal year ended March 31st, 1921, are given on page 153.

In HEAVY CHEMICALS the United States has, of course, some advantages by reason of its geographical situation, and comparative freight rates have, therefore, to be studied carefully when considering the prospects of competition with American manufacturers. Quick deliveries are essential, and for this reason ample stocks, warehoused in Canada, must be provided at various points from east to west.

In DYES and COLOURS a maintenance of advertising on behalf of British products will, no doubt, accrue to the advantage of the United Kingdom as compared with the United States, and German competition is likely to be hampered by the new Customs valuation regulations.

British manufacturers of TOILET REQUISITES, PERFUMERY, etc., should not lose sight of the fact that Canada's 8,714,103 people, with a considerable proportion of well-paid women workers, offer a much more valuable market *per capita* than does the United Kingdom, and they should be able to secure an important share of the trade, even in competition with domestic and United States manufacturers, provided that more attention is paid to containers, which must be more decorative than those for the home market. It is, however, a mistake for firms to grant particular large stores the exclusive sale of their product in any one district, in spite of the fact that these may have a large turnover, as the business is thus restricted within the limits of the *clientèle* of that house.

SOAPS.—Canada has a large domestic output of soaps, and the main demand from abroad is for powdered soaps and cleaners, these being supplied for the most part from the United States, though British manufacturers should be able to compete. Castile soaps are largely used, and there should be a good sale for the white Windsor variety. Shaving soaps must be well advertised, as the British article is often better than the domestic product. Containers should, however, in view of the high interior temperatures of Canadian homes, be airtight.

GLUES are mainly imported from the United States, apart from the domestic output, and British manufacturers should be able to gain a great deal of the trade now in the hands of American firms.

PAINTS AND VARNISHES are turned out in large quantities in Canada, and a vigorous advertising campaign is maintained by the domestic producers. The trade in high-quality articles is, however, one in which competition should be possible from the United Kingdom.

Among miscellaneous articles not cited in the foregoing tables, in regard to which export trade is susceptible of further development, may be mentioned :—

PAPER.—The Dominion is, of course, an important producer of paper and products thereof, but there are many grades of both paper and boards not yet manufactured in Canada, the bulk of which are imported at the present time from the United States. Full particulars regarding these lines have been obtained from the trade by His Majesty's Trade Commissioners in Canada, and sent to the Department of Overseas Trade in London for distribution to interested parties in Great Britain.

SHIPBUILDING REQUISITES.—Owing to the comparative shortage of work in the shipbuilding industries of Canada consequent upon the world depression, many Canadian manufacturers may cease the production of

various articles required in the construction and equipment of ships, and there may thus be a prospective demand for such lines, when trade revives, which agents of British manufacturers should be placed in a position to supply at the earliest possible moment.

AEROPLANES.—As has already been mentioned elsewhere in this booklet, Canada is paying considerable attention to aerial transport, and the market for machines of various makes is, therefore, worth watching by manufacturers in the United Kingdom.

BUILDING MATERIALS.—The housing problem is acute not only in the United Kingdom but in Canada as well, and the prospective demand for materials is great, provided that the financial difficulty is found susceptible of solution.

In the case of **SANITARY EARTHENWARE**, it is believed that a more economical system of packing by British shippers would result in greater satisfaction to Canadian dealers, and in larger orders. A study of American packing methods is to be recommended, particularly in view of the heavy freight rates, applying, of course, both to packing and contents.

CHINA AND EARTHENWARE.—Britain has for long held a good position in this trade, but aggressive foreign competition may be expected, particularly from Japan. Many firms in this trade try, with limited success, to do Canadian business through American intermediaries, and thereby lose much trade. A full report on the market for china, glass and earthenware has been prepared by the British Trade Commissioners in Canada, and is being distributed by the Department of Overseas Trade in London.

TOYS AND DOLLS.—The United Kingdom could probably secure a considerable increase in this trade if shippers would pay more attention to the special demands of the Canadian market, though at low prices. The best dolls come from the United Kingdom, the cheaper varieties being of Japanese manufacture. German competition has been made very difficult by

the recent Canadian Customs regulations regarding valuation for duty. Wooden toys on this market are mainly Canadian-made, and the large sale of mechanical toys accrues mainly to American manufacturers.

SCIENTIFIC APPARATUS.—The Canadian market for scientific apparatus is a good one, but to secure orders local agents, well provided with stocks and spare parts, are essential.

TELEPHONE AND TELEGRAPH APPARATUS.—A special report on this subject can be obtained from the Department of Overseas Trade in London, there being, of course, a very large market in a country of great distances, in which practically every family is a user of the telephone.

FURNITURE is, of course, largely made in Canada, which has easy access to raw materials in the shape of hardwoods, etc. There is, however, an opportunity for British competition in cane and wicker articles. Materials for soft furnishings are largely imported by Canadian manufacturers, and manufacturers of tapestry, velours, damasks, chintzes, etc., should, therefore, be able to secure business.

UMBRELLAS, PARASOLS AND MATERIALS THEREFOR.—Expansion is possible for British exporters of material for sticks, handles, frames and fittings.

WALLPAPERS.—There is a market for cheap and out-of-season wallpapers, for sale to farmers in the more remote districts of Canada.

BRUSHES.—Trade is possible in toilet (hair and tooth) brushes, if styles conform to the local taste and articles are well advertised, as the British toothbrush, in particular, is superior to that sold on this market. There is a demand for low-priced articles, at present met largely by Japan.

GROCERIES.—Articles which are well advertised in the United Kingdom should be saleable in Canada, particularly having regard to the large proportion of the population which is of British birth and training, whom the force of habit will lead to select lines to which they

have been accustomed in the Homeland in preference, often, to lower-priced articles of Canadian or foreign manufacture. Local requirements should, however, also be studied, and firms should particularly bear in mind before shipping that the Canadian regulations under the Meat and Canned Foods Act have to be complied with to the letter in view of the fact that domestic manufacturers are subject to rigid inspection of their products (at their own expense), and obviously cannot permit competition from any country not having a correspondingly strict system of food inspection.

CONFECTIONERY.—There is in Canada an important industry for the manufacture of chocolates, and importation is not at present on an important scale. English chocolates, however, last longer from the date of manufacture, and if this could be brought home to the trade in Canada by advertising, business would, no doubt, result to an encouraging degree. There is, however, obviously a necessity for warehousing ample stocks at each of the business centres from the Atlantic to the Pacific, but little doubt need be felt that trade, once obtained after conquering the difficulties of introduction, would be large and remunerative. There is a prospect for sales of cake chocolate, and the market should, therefore, be carefully investigated, it being, however, borne in mind that the trade expects a higher scale of profits than is customary at home.

The prohibition of the sale of intoxicating liquors proved to be a tremendous fillip to business in candies of every description, and these are now sold not only by confectioners, but by drug stores, cigar stores and in the various chain stores all over the Dominion.

CHEESE.—Canada is, of course, an important producer of cheese, but there is, nevertheless, a market there for proprietary lines in fancy cheeses.

CANNED FISH.—Trade could be developed by British firms in canned sardines and herrings of high quality, as much of the product sold locally is of secondary grade.

CANDLES are made in Canada, but there is some chance of successful competition by British manufacturers, and the market should, therefore, be investigated. The same remark applies also to GELATINE and ISINGLASS.

A determined effort by British packers of SEEDS should secure for them a larger share of the trade than comes their way at the present time.

In OIL CAKES, except the cotton-seed variety, trade could probably be secured by British exporters.

BOOKS.—It is, of course, much to be desired that the Canadian reading public as well as the many residents in the Dominion of British birth should find ample possibilities for procuring in Canada books and magazines by British authors, and it is believed that there is a very important market, particularly in Western Canada, for cheap reprints of standard fiction writers. Books of the old sevenpenny novel type could also be sold, provided that steps were taken to prevent book-sellers from charging exorbitant retail prices for these works. The value of securing sales in Canada for British scientific works will be appreciated not only by publishers, but also by firms manufacturing instruments illustrated and described therein.

Publishers should bear in mind that on June 4th, 1921, the Canadian Parliament passed an Act to amend former legislation regarding copyright, and particulars of the new statute could no doubt be obtained from the High Commissioner for Canada, 19, Victoria Street, S.W. 1, together with the various rules and forms based thereon. The provisions of the Act affect authors, composers, printers, publishers, dramatists, manufacturers of phonograph records, cinematograph film producers, art reproducers and similar interests.

Publishers of children's books should provide attractively-decorated boxes for display purposes in the stores; and British publishers of all categories should cease as early as possible the prevalent custom of including the Dominion of Canada in the American

rights in a book or other publication which they intend to sell to Canadian purchasers. Booksellers often refuse entirely to handle publications offered to them under these circumstances, and this sentimental consideration is one which should not be lost sight of, particularly at the present time.

ART REPRODUCTIONS, engravings, calendars, chromos, etc., are lines in which more business should be done by British firms. American manufacturers also do a good business in picture engravings of standard artists.

MUSICAL INSTRUMENTS.—There is a market in Canada for piano keys, actions, hammers, etc., for the local pianoforte-manufacturing industry; and BRASS-BAND INSTRUMENTS of British manufacture should find better sales than at present, German competition in all lines being difficult by reason of the recent customs regulations.

TOBACCONISTS' SUNDRIES from the United Kingdom could also be sold in greater volume than at present.

BOOTS AND SHOES.—The domestic manufacturers have now secured the control of more than nine-tenths of the market for boots and shoes, but English-made brogues still secure sales, and novelties of any kind would no doubt be worth trying in the Canadian market, if thoroughly well advertised.

LEATHER GOODS must combine lowness of price and lightness of weight, especially in travelling goods. There should be a growing business in novelties and fancy goods.

RUBBER GOODS of most descriptions are manufactured in Canada, there being an enormous consumption by grain elevators of RUBBER BELTING. RUBBER CLOTHING is a line in which the United Kingdom can compete, but it should be adapted to Canadian climatic conditions. In druggists' sundries, erasers, surgical goods, golf balls, football bladders and others of the smaller lines, British firms should be able to do trade.

The exchange situation, to which reference is made previously in this booklet, will merit very careful

attention from British exporters to Canada during the next few months—unless there is a very drastic change in the commercial policy of the United States in the near future—as, owing to the attempted embargo placed by the 1921 American Emergency Tariff (and the threat contained in the Fordney Permanent Tariff Bill) upon imports of Canadian agricultural and other natural products into the United States, an export trade recently worth about \$225,000,000 per annum may be diverted from the United States market to other quarters, notably the United Kingdom. A powerful support to the Canada-U.S.A. exchange is thus likely to be removed, and it is very doubtful whether the level of from 12 to 15 per cent. from parity obtaining during 1921 will be maintained when the expected general revival of purchasing gathers momentum during the spring of 1922, with the added stimulus of good grain harvests, particularly in Western Canada. The diversion of these exports of farm and dairy produce to British and European markets may also affect the value of the sovereign in Canada, and with the resumption of eastward shipments on a large scale in the autumn the exchange rates should (unless affected by international arrangements for stabilisation) respond considerably to the advantage of British exporters who have been able to study the market and to persuade wholesalers in the Dominion to replace goods hitherto obtained south of the international boundary line with competing lines from Great Britain.

The decision of the Canadian Customs authorities to value American imports for duty not, as hitherto, on the face value stated on the invoice expressed in United States dollars, but on the actual cost of production (plus a reasonable profit) on the date of shipment from an American point, the value in question to be augmented for duty purposes by the exchange margins existing on that particular date, adds forthwith an additional burden of hardly less than 15 per cent. to the amount payable in duties. At the same time

imports from the United Kingdom are valued for duty on a basis conceding the importer the full benefit of the depreciation of British currency across the Atlantic. For instance, British goods valued at £100 on a day when the rate of exchange is \$4.40 = £1 are assessed for "preferential" duties, not on their face value but on $\frac{£100 \times \$4.40}{\$4.866}$ or £90 8s. 3d., whereas American goods

valued at \$100 and shipped on a day on which the exchange margin reached 15 per cent. would incur duties at general tariff rates assessed on \$115 instead of on their face value. Should the Anglo-Canadian and the Canada-U.S.A. exchange rates fluctuate during the coming months to the extent apparent in other post-Armistice years, the measure of advantage to the British competitor will be extremely important, and the conditions outlined above should of themselves impel many firms not hitherto greatly interested in the Canadian market to examine the situation there, and to endeavour to get into touch with wholesalers at present importing mainly from the United States.

In his last Report to the Department of Overseas Trade in London, Captain E. J. Edwards, formerly His Majesty's Senior Trade Commissioner in Canada, commenting upon the overwhelming proportion of the Canadian import trade attributed hitherto to the United States, said :—

"While admitting the difficulties, I consider that there are very few trades where these obstacles amount to impossibilities. The present position is largely the result of failure on the part of British manufacturers to realise the position. My own opinion, which is shared by all who have a knowledge of trade conditions in Canada, is that now is the crucial time for manufacturers from the United Kingdom to regain or obtain trade to which, it must be conceded, they have more right than a foreign country. To my mind the Canadian Government and people have shown in a marked and tangible way their desire to encourage

imports from the United Kingdom in preference to the United States, for not only does the former enjoy preferential tariff, but, owing to the recent enactments, the Dominion will in effect be giving a further preference, so long as the Canadian dollar is appreciated in relation to sterling and depreciated in terms of American currency, by calculating Customs duty on the Canadian value of goods imported at the current rate of exchange."

CHAPTER VI

HOW TO MARKET BRITISH GOODS IN CANADA

I. — SOURCES OF INFORMATION TO BRITISH EXPORTERS SEEKING CANADIAN BUSINESS

It goes without saying that by far the best method of securing information regarding the prospects for the marketing of goods in the Dominion is a personal visit to Canada by a responsible member of the firm possessed of adequate knowledge not only of the sales department of the business, but also technical training in the processes of manufacture of his firm's products. To firms unable to initiate their Canadian trade in this manner the various offices in the United Kingdom of the Canadian Government, the railway, steamship and express companies, Canadian advertising agents, etc., are at all times willing to render every possible assistance in securing the information necessary to them in the first stages of their campaign. Mention may also be made of the services performed in this connection by the Department of Overseas Trade (Development and Intelligence), whose offices are at 35, Old Queen Street, Westminster, S.W. 1, and 73, Basinghall Street, E.C. 2, and which is in a position to supply to British firms information respecting :—

- (a) Contracts open to tender ;
- (b) The Canadian demand for particular goods ;
- (c) Lists of Canadian importers of various goods ;
- (d) Suitable agents for British manufacturers and merchants ;
- (e) The best methods of marketing and distribution, and credit conditions ;

the Department being represented in Canada by three Trade Commissioners, stationed respectively at :—

MONTREAL.

G. T. Milne, Esq., His Majesty's Senior Trade Commissioner in Canada, 248, St. James Street, Montreal (Cable address : " Britcom ").

TORONTO.

Mr. F. W. Field, His Majesty's Trade Commissioner, 257-260, Confederation Life Building, Queen Street East, Toronto (Cable address : " Toroncom ").

WINNIPEG.

Mr. L. B. Beale, His Majesty's Trade Commissioner, 610, Electric Railway Chambers, Winnipeg (Cable address : " Wincom ").

In addition to the above, there were until recently Imperial Trade Correspondents at Calgary, Edmonton, Vancouver, St. John, Halifax and Quebec. The Department of Overseas Trade has, however, been obliged, in response to the insistent call for economy, to cancel its expenditure on these services. As the result, therefore, the commercial interests in Canada of Great Britain would appear to be regrettably under-represented if comparison is made with the excellent consular service maintained in the Dominion by the United States.

Reports from the Trade Commissioners are published regularly in the *Board of Trade Journal*, and annual reports on the trade of Canada are sold by H.M. Stationery Office.

The FEDERATION OF BRITISH INDUSTRIES, 39, St. James's Street, London, S.W. 1, has as its correspondents in the Dominion the Canadian Association of British Manufacturers. This Association, established in March, 1919, with branches at Montreal and Toronto, represents the interests of hundreds of British firms trading in

Canada, and is in a position to render valuable services to those concerns. The Association consists of :—

- (a) British manufacturers and wholesale exporters from the United Kingdom ;
- (b) Representatives and agents of British manufacturers and wholesale exporters from the United Kingdom.

The following trade sections, which meet monthly to discuss matters pertaining to their particular business, have been formed by the Toronto branch, whose office is at 32, Front Street West, and somewhat similar trade sections have been formed by the Montreal branch, the office of which is at 157, St. James Street :—

- (a) *Cotton and Wool Fibres*.—Comprising cotton, wool, silk and other fibres, and all manufactures thereof ;
- (b) *Food Products*.—Comprising cereals, meats, fish, groceries, and grocers' supplies ;
- (c) *Metal Products*.—Comprising iron and steel and all other metals and manufactures thereof ;
- (d) *Clay Products*.—Comprising earthenware, stoneware, glassware, and all manufactures of clay and its essentials ;
- (e) *Wood Products*.—Comprising wood and all manufactures of wood or of which wood is the chief component, wood pulp, paper, and paper products ;
- (f) *Chemicals*.—Comprising heavy chemicals, dye-stuffs, oils, drugs, drug sundries, polishes and kindred materials and manufactures ;
- (g) *Leather Products*.—Comprising hides, leather, findings, and all manufactures of leather.

Both branches of the Association co-operate closely with the Federation of British Industries at home, as well as with His Majesty's Trade Commissioners in Canada.

The second annual report of the Canadian Asso-

ciation of British Manufacturers and their Representatives shows that this young but virile organisation is fulfilling a very useful purpose in Canada. It now has over 200 representatives of British manufacturers and exporters, and its efforts to promote British trade deserve every commendation. Among its achievements during 1920 were the modifications in the rulings regarding the customs valuation of invoices and in the new excise taxes. The Iron and Steel Section were also successful in inducing the Canadian authorities not to increase the duties on tool steel from the United Kingdom.

The BRITISH AGENTS' ASSOCIATION OF CANADA, whose secretary is Mr. J. Hugh Peattie, 207, St. James Street, Montreal, was established at Montreal in 1901. Any agent representing British firms may become a member of the organisation, the object of which is "the mutual protection of its members in whatever direction their interests are affected." The membership of the Association largely comprises the agents of United Kingdom textile firms.

In all the cities and considerable towns of Canada there is a BOARD OF TRADE or CHAMBER OF COMMERCE, usually a very active institution, the Secretary of which is always glad to render assistance to visiting representatives of British firms or to afford information to concerns making inquiries regarding conditions in their respective neighbourhoods.

The CANADIAN CHAMBER OF COMMERCE IN LONDON.—For some years past members of the Canadian business community in the United Kingdom have felt the need of an organisation which would combine their influence in matters affecting the commercial interests of the Dominion in Great Britain. The opportunity afforded by the great development of Canada's post-war export and import trade, and the considerable increase in the numbers of agents of Canadian manufacturers and exporters now established in London and in other points on the European side of the Atlantic, has been

taken, and steps have been taken to set up a body to be known as the Canadian Chamber of Commerce.

The organisers have been fortunate in securing influential backing among the Anglo-Canadian business community in London, and there is little doubt that the Canadian Chamber of Commerce now established is on a sound, permanent basis, from which it will develop to the constant advantage of Canadian interests in the United Kingdom. The principal officers of the Chamber are mentioned below, and the members of the Council include most of the leading Canadian business men in London :—

President.—Sir George McLaren Brown, K.B.E., European General Manager of Canadian Pacific Railway and Canadian Pacific Steamships.

Vice-Presidents.—H. B. Robinson, Esq., Assistant European General Manager of Massey-Harris, Ltd.; Lieut.-Colonel W. Grant Morden, M.P., Canada Steamship Lines, Ltd.

Hon. Secretary and Treasurer.—R. B. Stewart, Esq., 55, Holborn Viaduct, E.C. 1.

II.—THE APPOINTMENT OF AGENTS.

British firms contemplating business in Canada are likely to achieve very little success unless they are prepared either to open offices of their own under their own managers or in co-operation with other firms producing non-competing lines, which can be dealt with in the same warehouses and handled by the same staff of commercial travellers; or, alternatively, to secure the services of Canadian agents able and willing to give adequate attention to the marketing of their principal's goods in every one of the important business centres throughout the Dominion. The first alternative has much to be said for it, particularly in the case of mechanical lines in respect of which spare parts are likely to be in request at short notice, and a number of English firms have

arrangements with Canadian manufacturers for the assembly in the Dominion of machinery, etc., and the distribution of parts the shipment of which from the home factory would entail irritating delays capable of effectually killing future business. Business houses in the United Kingdom are still prone to some extent to leave their Canadian representation in the hands of American firms, or to transact their Canadian trade through an office in New York and a staff of American travellers. Such methods of business, if not suicidal, are severely detrimental to successful exploitation of the Canadian market, as the firms pursuing this course lose the valuable sentimental asset conferred upon them by their British origin, and in addition involve their customers in many difficulties, owing to the necessity of effecting payment in American funds, now at a heavy premium in the Dominion. It is a mistake to expect a manufacturers' agent working a large number of other lines to look after his principal's business over a field so enormous as that of Canada, and British firms should therefore look out for high-class firms known to specialise in lines similar to—if not competing with—their own, and having their own branch offices in each of the main geographical areas in which there is a sale for goods of the class for which it is desired to find a market; or, alternatively, select reputable firms in each area with the sole agency for the particular region or Province. Goods saleable in one Province of Canada are not necessarily saleable all over the Dominion, especially if they are tools required by a particular industry, and there is therefore a necessity for careful study of the market before risking trouble and expense in exploiting its capacity to buy. Goods suitable for sale throughout Canada should be placed in the hands of firms having either head offices or adequate connections in, say, the following distributing centres:—

- (1) HALIFAX or ST. JOHN.—For the Maritime Provinces;

- (2) MONTREAL.—For the Province of Quebec, and for Ontario as far west, say, as Ottawa or Peterborough. (The appointment of a French-Canadian as agent at Quebec for the French-speaking population has much to recommend it.)
- (3) TORONTO.—For the towns around Lake Ontario and the Niagara Peninsula, and including Sault Ste. Marie in the west of the Province of Ontario ;
- (4) WINNIPEG.—For the entire West, or better for Manitoba only, with agents also at—
- (5) REGINA or SASKATOON.—For the Province of Saskatchewan ; and at
- (6) CALGARY or EDMONTON.—For Alberta and South-Eastern British Columbia ;
- (7) VANCOUVER.—For British Columbia, including Vancouver Island, and for the Yukon Territory.

A satisfactory agent once found and appointed should be well treated in the matter of remuneration and expenses, well supplied with catalogues, well supported in the matter of advertising (this, as a rule, should be arranged by the principals through advertising agents), and adequately supplied with stock with which to meet rush orders. There has been some complaint in the past in regard to each one of these matters, and British firms do not always compare favourably with American houses, with the result that the agents—being human—may be driven to neglect the ill-paid work whilst giving preference to that which offers them encouragement for hard work.

Firms who have taken great trouble in securing a good agent should be willing to go to an equal amount of trouble in order to put into effect suggestions which he may find it necessary to make from his local knowledge in respect, say, of style of finish, packing, advertising, etc. The quality of British-made goods is far more respected in Canada than is sometimes believed in Great Britain, but an agent may often find it necessary to suggest certain changes in pattern to bring the goods in harmony with conditions—psychological or climatic—in

his part of the Dominion the acceptance of which would multiply sales greatly to the advantage both of principal and agent. The matter of PACKING for the Canadian market should receive careful attention, as there are often very important reasons for the preference shown by agents or customers in their instructions to principals in this regard. Requirements may not necessarily be the same all over the Dominion, but, speaking generally, cases should not be unnecessarily thick and expensive, as the smallest addition to the weight of the consignment constitutes a charge upon the importer for the cost of the case, and sometimes to the amount of freight payable thereon. Canadian agents generally find that when the market is visited occasionally by responsible representatives of the United Kingdom principals, little difficulty is experienced in working business on satisfactory lines. When the principals never appear on the spot relations are not so intimate, and the agent's position, wishes and recommendations are not clearly understood or followed. There should be the utmost sympathy and support for a reliable agent who is exploiting a difficult and extensive market, often at his own risk and expense, in competition with Canadian and American firms whose treatment of agents and business methods sometimes enables them to market goods inferior in quality and bearing a higher price than the corresponding British product. Fortunately, there has been of recent date a revival of interest in the Canadian market on the part of the heads of British firms, and large numbers of prominent business men have been in the Dominion since the falling off of rush production in 1920.

THE PLACE OF THE MERCHANT IN ANGLO-CANADIAN TRADE.—It is an undoubted fact that in general, business men in North America have a desire for direct business relations between the importer and the manufacturer, very little trade being at present carried on through the great merchants and indent houses in the city of London through whom India, Australasia, South Africa, the Far East and other markets receive such a huge volume

of British-made goods. There is, however, no very clear reason for a continuation of the comparative neglect of the Canadian market by the British merchant house, and many powerful incentives to a study of the conditions obtaining there as the result of war-time and post-war experiences. During the past few years both the United States and Canada have become exporting countries to an extent greater than ever before, both in regard to variety and to quantity of goods sold abroad. Many efforts in this direction have, however, failed for the lack of that experience in which the English merchant has no peer. There are in Canada several manufacturing concerns able to afford that efficient export organisation essential for the world-wide trade which it is the determination of the Canadian people to attain, but it is in no sense derogatory to assert that the great bulk of the manufacturers of the Dominion, whether at present exporting or not, could utilise to their immense advantage the services of experts in import and export trade of which there are so many in Great Britain, with its centuries of experience of every market. The value of the export merchant has already been realised by many manufacturers in the Dominion, many of whom now transact foreign trade through newly-established Canadian agency houses having branch offices in the various overseas markets now served from both Atlantic and Pacific ports. These concerns are, as a rule, represented in the city of London by agents who are willing not only to sell Canadian goods, but also to act on behalf of British manufacturers seeking a market for their products in the Dominion. A number of British merchant houses already have representatives in Canada who facilitate trade between that country and those British Colonies and dependencies requiring special skill for their exploitation, and it would seem probable that a more careful study of the opportunities in this direction on the part of the mercantile community in Great Britain would tend to a clearer understanding of the value of the merchant to Canadian

business men not only in connection with export trade, but as an intermediary between the Canadian market and those numerous British manufacturers whose organisation is not strong enough to permit of their making that detailed study of the needs of the Dominion which is essential before export trade can be entered upon on a thoroughly satisfactory basis. Trade is exchange, and in his own personality the merchant expresses this fact completely. It would appear, therefore, that in spite of preconceived opinions on both sides of the Atlantic, and in spite also of a good deal of experience of pre-war conditions, there should be a place in Canadian business life for the world-wide experience and organisation of many more of our great mercantile houses at present absent therefrom.

III.—THE NECESSITY FOR ADVERTISING.

Canadian and American products are advertised very freely on posters and signs, as well as in the newspapers, trade journals and other periodicals circulating among possible buyers, and it should be borne in mind by British firms that, while a considerable proportion of the people of Canada are city-dwellers who have access to large department stores and other places of merchandise where goods of every description are prominently displayed, a very large number live in rural communities and depend to a remarkable extent upon newspaper advertising for their knowledge of the world's manufactured products. Canadians are great readers both of newspapers and books, and much of the popularity in Canada of American proprietary lines is due to the vast sale in Canada of American periodicals and the generous advertising of American goods in magazines, etc., enjoying a wide sale in the Dominion. The improvement of recent date in British advertising methods in the Dominion is most welcome, but it is notable that—in Western Canada at all events—Canadian firms occupy about 60 per cent. of the adver-

tising space. American firms 35 per cent., and United Kingdom firms only 5 per cent. An American journal recently stated :—

“ Canada is undoubtedly beginning to bulk large in the eyes of British manufacturers of various products. There was a healthy growth in British sales to Canada before the war, but from 1914 to the end of the war the exportations of manufactured products to Canada fell away almost to nothing, as was natural under the circumstances.

“ That British manufacturers, however, have no intention, in the future, of allowing Canadian trade opportunities to go uncontested, as was perforce the case during war-time, is shown by the steadily increasing number who are advertising to the trade throughout Canada—and in some cases direct to the consumer as well.”

Well-planned advertising, therefore, is—particularly in the Canadian market—a good investment ; it being understood that the agent's name and address should be given prominence in all advertisements. Advertisers should never lose sight of the fact that advertising appeals to buying power rather than to individuals considered numerically, the 8,714,103 of Canadians representing far more than that number of Englishmen, Frenchmen or Poles in virtue of their considerably larger spending capacity and their general disposition to purchase high quality goods rather than the merely “ cheap and nasty ” varieties.

While the advertising must be done by the United Kingdom manufacturer, it is comparatively useless for him to do this without the assistance of some one who can give disinterested and expert advice on the “ matter ” and “ lay-out ” of the copy, and also the media to be employed. It is a great mistake to imagine that advertising copy which has been proved to have had a pulling power in England will have the same success in Canada, and while many manufacturers have successfully used the same scheme in Canada as

they have in England, and even in some cases the same blocks, the copy has been altered and adapted to suit the market.

Unless the United Kingdom manufacturer has on his advertising staff some one with an intimate, personal knowledge of Canada, or else is satisfied that the advertising agent whom he employs is so equipped, it is probably desirable for him to entrust his advertising to one or other of the Canadian advertising agencies of repute, for these latter are not only able to frame up a good advertisement, but it is their business to know which papers will produce the best results for the particular article advertised. Instances frequently come to notice of really good United Kingdom advertising appearing in totally unsuitable papers. An article advertised in the evening daily papers in a big city might bring excellent results, but the identical advertisement inserted in the weekly edition of the same paper would probably be wasted money, although the weekly has a larger circulation than the daily. The explanation of this is that the daily paper circulates in the larger cities, while the weekly reaches only the more rural districts. Mere circulation figures should not be considered without knowledge of the class of public reached by the journal in question.

It is very satisfactory that a few United Kingdom manufacturers are backing up their newspaper advertising by posters, and in addition have arranged for special window displays and store advertising. Posters used with success in the United Kingdom would in most cases prove totally unsuitable for Canada, for not only is it doubtful whether the matter would appeal, but also it must be remembered that the majority of the hoardings in the more important cities are of uniform size and are so arranged that they take mammoth posters each having a solus position. Most of these are brilliantly lighted until after midnight.

Information and guidance regarding advertising in Canada is obtainable with little difficulty in the United

Kingdom, several of the under-mentioned advertising agencies having connections both in Canada and in the United Kingdom which enable them to plan economical and effective campaigns in those mediums of publicity suitable to the goods concerned :—

The Ashby Service Agency, Ltd., 26–27, High Holborn, W.C. 1.

T. B. Browne, Ltd., 163, Queen Victoria Street, E.C. 4.

William Dawson & Sons, Cannon House, Bream's Buildings, E.C. 4.

* A. McKim, Ltd., 1, Arundel Street, W.C. 2.

C. Mitchell & Co., Ltd., 1–2, Snow Hill, E.C. 1.

* Smith, Denne & Moore, Ltd., 150, Southampton Row, W.C. 2.

N.B.—Firms marked * are Canadian concerns with London offices.

Most of the more important of the Canadian daily newspapers have representatives in London ; and, as will be seen below, many of the larger trade journals published in the Dominion having a national circulation—many of them issued by publishing houses controlling from half a dozen to a dozen periodicals of the kind—have agents in the United Kingdom :—

Mr. R. W. Baker, 29, Ludgate Hill, E.C. 4 (*Toronto Mail and Empire*).

Mr. T. R. Clougher, 20, Craven Street, W.C. 2 (*Halifax Herald, St. John Times-Star, Montreal Gazette, Toronto Globe, Winnipeg Tribune, Calgary Albertan, etc.*).

Mr. M. A. Jamieson, 17–19, Cockspur Street, S.W. 1 (*Montreal Star*).

Mr. F. W. Large, Fulwood House, Fulwood Place, W.C. 1 (*Ottawa Journal, Toronto News, Manitoba Free Press, etc.*).

Mr. F. A. McKenzie, 11A, Torrington Place, W.C. 1 (*Toronto Star*).

Mr. Frederick A. Smyth, 29, Ludgate Hill, E.C. 4 (*St. John Telegraph-Sun, St. John Standard, Montreal La Patrie, Regina Leader, Calgary Herald, Edmonton Journal, Saskatoon Phoenix, Vancouver World, etc.*).

The Baker and Confectioner, Toronto.

The Bookseller and Stationer; and *The Printer and Publisher*, Toronto.

(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

The Canadian Bookman, Gardenvale, Quebec.

The Canada Lumberman, Toronto; and *The Western Lumberman*, Winnipeg.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

Canadian Chemistry and Metallurgy, Toronto.

The Canadian Cigar and Tobacco Journal, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

The Canadian Druggist, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

The Druggists' Weekly, Toronto.

(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

The Retail Druggist of Canada, Toronto.

(London: Sharland & Co., Eldon Street House, E.C. 2.)

The Western Druggist, Winnipeg.

The Canadian Dyer and Colour User, Toronto.

The Canadian Engineer, Toronto.

Contract Record and Engineering Review, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

Construction, Toronto.

The Sanitary Engineer, Plumber and Steam Fitter, Toronto.

(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

The Canadian Fisherman, Gardenvale, Quebec.

The Canadian Foundryman; and The Canadian Machinery and Manufacturing News, Toronto.
(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

The Canadian Furniture World and Undertaker, Toronto.
(London: Sharland & Co., Eldon Street House, E.C. 2.)

The Canadian Woodworker and Furniture Manufacturing, Toronto.

The Furniture Journal, Toronto.

The Canadian Grocer, Toronto.

(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

The Retail Grocer and Provisioner, Toronto.

(London: Sharland & Co., Eldon Street House, E.C. 2.)

Prix Courant, Montreal.

Commercial, Winnipeg.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

Winnipeg and Western Grocer, Winnipeg.

Hardware and Metal of Canada, Toronto.

(London: MacLean Company of Great Britain, Ltd., 88, Fleet Street, E.C. 4.)

Hardware and Accessories, Toronto.

The Western Hardware Dealer, Winnipeg.

The Canadian Harness and Shoe Repair Journal, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

Footwear in Canada, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent Street, S.W. 1.)

Shoe and Leather Journal, Toronto.

The Canadian Manufacturer, Toronto.

(London: Sharland & Co., Eldon Street House,
E.C. 2.)

The Canadian Mining Journal, Gardenvale, Quebec.

(London: Mr. W. A. Mountstephen, 16, Regent
Street, S.W. 1.)

*The Canadian Motor Cycle; The Motor Magazine of
Canada; and Motor Trade*, Toronto.

*The Canadian Motor Tractor and Implement Trade
Journal*, Toronto.

(London: MacLean Company of Great Britain,
Ltd., 88, Fleet Street, E.C. 4.)

The Canadian Music Trades Journal, Toronto.

The Canadian Railway and Marine World, Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent
Street, S.W. 1.)

Marine Engineering of Canada, Toronto.

(London: MacLean Company of Great Britain,
Ltd., 88, Fleet Street, E.C. 4.)

The Canadian Textile Journal, Gardenvale, Quebec.

(London: Mr. W. A. Mountstephen, 16, Regent
Street, S.W. 1.)

The Canadian Tire and Accessory Journal, Toronto.

(London: Sharland & Co., Eldon Street House,
E.C. 2.)

The Clothier and Haberdasher; and Women's Wear,
Toronto.

(London: Mr. W. A. Mountstephen, 16, Regent
Street, S.W. 1.)

The Dry Goods Review; and Men's Wear Review, Toronto.

(London: MacLean Company of Great Britain,
Ltd., 88, Fleet Street, E.C. 4.)

Western Dry Goods, Winnipeg.

Electrical Dealer and Contractor, Toronto.

(London : Sharland & Co., Eldon Street House,
E.C. 2.)

Electrical News; and *Power House*, Toronto.

(London : MacLean Company of Great Britain,
Ltd., 88, Fleet Street, E.C. 4.)

The Electrical West, Winnipeg.

Iron and Steel of Canada, Gardenvale, Quebec.

Pottery, Glass, House Furnishings and Toys, Toronto.

The Trader and Canadian Jeweller, Toronto.

(London : Mr. W. A. Mountstephen, 16, Regent
Street, S.W. 1.)

The Maritime Merchant, Halifax, N.S.

With regard to the distribution in Canada of PRICE LISTS AND CATALOGUES—a most essential form of advertising, in which British firms are even now extremely deficient in comparison with their American competitors—it may be remarked that the Customs grant free entry to such as do not mention the name of a Canadian agent, and are sent to actual merchants in single copies for the merchant's own use rather than for distribution.

Other advertising matter—of every description—is dutiable at ten cents per pound weight, under the British Preferential Tariff, and arrangements have been made under which duty on packages sent out to Canada from this country may be prepaid by Customs Revenue stamps obtainable from the High Commissioner for Canada, 19, Victoria Street, London, S.W. 1, for one cent, two cents, five and ten cents respectively, and intended for use according to the following scale :—

Under the British Preferential Tariff.

	Duty.
Up to and including $1\frac{1}{2}$ oz.	1 cent.
Over $1\frac{1}{2}$ oz. and not exceeding $3\frac{1}{4}$ oz.	2 cents.

				Duty.	
Over	3 $\frac{1}{4}$ oz.	and not exceeding	4 $\frac{3}{4}$ oz.	.	3 cents.
"	4 $\frac{3}{4}$	"	"	"	4 "
"	6 $\frac{1}{2}$	"	"	"	5 "
"	8	"	"	"	6 "
"	9 $\frac{1}{2}$	"	"	"	7 "
"	11 $\frac{1}{4}$	"	"	"	8 "
"	12 $\frac{3}{4}$	"	"	"	9 "
"	14 $\frac{1}{2}$	"	"	"	10 "

IV.—THE TRANSPORTATION OF GOODS TO CANADA.

United Kingdom ports are in touch with Canada both on the Atlantic side and on the Pacific, and the piercing of the American continent by the Panama Canal is likely to exercise a stimulating effect upon British trade with Western Canada through the port of Vancouver, B.C.

In the ATLANTIC TRADE there are a number of companies transporting freight to the port of Montreal in the summer, and in winter to the Canadian ports of Halifax and St. John, or through the American port of Portland (Maine) to points on the Grand Trunk Railway system. Two of the steamship systems concerned are run in close association with the great Canadian railways, the others being independent, and for the most part under British control. Taking the companies in alphabetical order, there are services between British and Canadian Atlantic ports operated by :—

The Anchor-Donaldson Line, 14, St. Vincent Place, Glasgow. From Glasgow, Bristol and London to Montreal (in summer), or Halifax (in winter).

The Canadian Government Merchant Marine, Ltd. (Operated in conjunction with the Canadian National Railways, and in association with the Cunard Line.) From Montreal and Quebec (in summer), and Halifax and St. John (in winter), to London, Liverpool, Glasgow, Cardiff, Swansea, and Newport. Offices :—London : 17-19, Cockspur Street, S.W. 1 ; 44-46, Leadenhall

Street, E.C. 3. Liverpool: Cunard Building. Glasgow: 125, Hope Street. Manchester: 7, Brazennose Street.

The Canadian Pacific Steamships, Ltd. (Operated in conjunction with the Canadian Pacific Railway Company.) From Quebec and Montreal (in summer), and St. John, N.B. (in winter), to Liverpool, London, Glasgow, Southampton and Bristol. Offices:—London: 18-19, Pall Mall, S.W. 1; 103, Leadenhall Street, E.C. 3. Liverpool: Royal Liver Building. Bristol: 18, St. Augustine's Parade. Glasgow: 25, Bothwell Street. Birmingham: 4, Victoria Square. Manchester: 1, Mount Street. Belfast: 41-43, Victoria Street. Londonderry: 50, Foyle Street.

The Cunard Steamship Co., Ltd. (Operated in association with the Canadian Government Merchant Marine.) From Liverpool, Bristol, London and Queens-town to Halifax, N.S., or Montreal. Offices:—Liverpool: Cunard Building. London: 51, Bishopsgate, E.C. 2; 29-30, Cockspur Street, S.W. 1. Bristol: 65, Baldwin Street. Cardiff: 18A, High Street. Birmingham: 117, New Street. Southampton: Maritime Chambers. Plymouth: 1, Millbay Road. Manchester: 98, Mosley Street. Bradford: 24, Charles Street.

Messrs. Furness, Withy & Co., Ltd. Operated from Liverpool to Halifax, N.S.; London to Halifax, N.S.; London to St. John, N.B.; London to Montreal (in summer); Hull to Montreal (in summer); Manchester to Halifax, N.S., and St. John, N.B. Offices:—Liverpool: Royal Liver Building. London: Furness House, Billiter Street, E.C. 3. Cardiff: Cymric Buildings, West Bute Street. Newcastle-on-Tyne: Collingwood Buildings. And at Glasgow and Middlesbrough.

The Head Line. Operated from Belfast, Londonderry, Dublin and Cork to Montreal (in summer), and to St. John, N.B. (in winter).

The Inter-Continental Transport Services, Ltd. (Operated by the Canada Steamship Lines Ltd., in conjunction with Scandinavian shipowners.) From

Canadian Great Lakes and St. Lawrence River ports (in summer) and St. John, N.B. (in winter) to London and Liverpool. Agents: Messrs. Japp, Hatch & Co., Ltd., 1, St. Mary Axe, London, E.C. 3; 20, Castle Street, Liverpool. Messrs. F. C. Strick & Co., Ltd., Exchange Buildings, Cardiff; Dock Chambers, Barry; 7, Prospect Place, Swansea; 131, Dock Street, Newport; 73, Queen Square, Bristol; Derwentwater Chambers, Sandhills, Newcastle-on-Tyne; 87, St. Vincent Street, Glasgow.

The Manchester Liners, Ltd. From Manchester to Montreal (in summer), or to St. John or Halifax (in winter). Offices:—Manchester: 108, Deansgate. London: Messrs. W. W. Jones, Dooly & Co., 95, Leadenhall Street, E.C. 3. Sheffield: 43, The Wicker. Bradford: 36, Brook Street. Birmingham: 6, Victoria Square.

The Royal Mail Steam Packet Company. London to St. John, N.B. (For addresses, see p. 184.)

The White Star-Dominion Lines. Liverpool and Bristol to Quebec and Montreal (in summer), and to Halifax, N.S. (in winter). Offices:—Liverpool: 27 and 30, James Street. London: 38, Leadenhall Street, E.C. 3; 1, Cockspur Street, S.W. 1. Bristol: West India House. Birmingham: 63, Temple Row. Manchester: 56, Mosley Street. Bradford: 60A, Leeds Road. Leeds: 83, Vicar Lane. And at Southampton.

British Ports to the Pacific Coast (viâ the Panama Canal).

The Blue Funnel Line. Monthly joint service with Harrison Line; from London, Glasgow and Liverpool to Victoria, B.C., and Vancouver, B.C. Offices:—Liverpool: Alfred Holt & Co., India Buildings. London: Killick, Martin & Co., 7, Fen Court, E.C. 3. Glasgow: Colin Scott & Co., 94, Hope Street; and Mr. J. A. Roxburgh, 59, Buchanan Street. Swansea: Burgess & Co., Ltd.; and Mr. T. H. Couch.

Ernest Bigland & Co., Ltd., 7, East India Avenue, London, E.C. 3. London to Vancouver, B.C.

The Furness Line. Leith and London to Vancouver, B.C. (For addresses, see p. 182.)

The Harrison Line. Liverpool, Glasgow and London to Vancouver, B.C. Offices :—Liverpool: Messrs. Thomas and James Harrison, Mersey Chambers. London: Dock House, Billiter Street, E.C. 3.

E. H. Mundy & Co., Ltd., 1-14, Trinity Square, London, E.C. 3. London to Vancouver.

MacGregor, Gow and Holland, Ltd. East Coast ports to Vancouver, B.C. Offices :—London: 1-4, Fenchurch Avenue, E.C. 3. Hull: Ocean House, Alfred Gelder Street. Bradford: 15, Bridge Street. Southampton: 8, Gloucester Square. Manchester: Northern Assurance Buildings, Albert Square.

The Royal Mail Steam Packet Co. (in association with the Holland-America Line). From London to Vancouver, B.C. (*viâ* Panama Canal). Offices :—London: 18, Moorgate Street, E.C. 2; 32, Cockspur Street, S.W. 1. Southampton: R.M.S.P. Buildings. Manchester: 5, Albert Square. Liverpool: Goree, Water Street. Birmingham: 78, New Street. Glasgow: 125, Buchanan Street.

*Express Companies and Shipping Agencies in
the Canadian Trade.*

The undermentioned are among the large transportation and express companies which are in a position to render assistance to British exporters in connection with the shipment of goods to Canada, and their clearance from Customs :—

Arbuckle, Smith & Co., Ltd. Liverpool: 3-5, Rumford Street. Glasgow: 63A, St. Vincent Street. London: 85, Gracechurch Street, E.C. 3.

The Canadian National Express Co. Liverpool: 20, Water Street. London: 17-19, Cockspur Street, S.W. 1; 44-46, Leadenhall Street, E.C. 3. Glasgow: 75, Union Street. Manchester: 7, Brazennose Street.

Davies, Turner & Co., Ltd. London: 52, Lime

Street, E.C. 3 ; 35, Warwick Street, S.W. 1. Liverpool : 28, Brunswick Street. Bristol : 36, Baldwin Street. Birmingham : 12, Cherry Street.

The Dominion Express Co. London : 62-65, Charing Cross, S.W. 1 ; 103, Leadenhall Street, E.C. 3. Liverpool : Royal Liver Building. Manchester : 1, Mount Street. Glasgow : 25, Bothwell Street. Belfast : 41-43, Victoria Street. Bristol : 18, St. Augustine's Parade. Birmingham : Winchester House, 4, Victoria Square. Sheffield : 43, The Wicker.

Gerhard and Hey, Ltd. London : 1-3, Great St. Thomas Apostle, E.C. 4. Manchester : 14, King Street. Liverpool : 26, Preeson's Row. Hull : Royal Insurance Buildings.

Oscar Harris, Son & Co. London : 30, Great Tower Street, E.C. 3.

C. W. Hartrodt & Co., Ltd. London : 9-10, St. Mary at Hill, E.C. 3. Liverpool : 18, James Street.

Henry Johnson, Sons & Co., Ltd. London : 18, Byward Street, E.C. 3.

E. and A. Kimpton & Co., Ltd. Liverpool : Albert Buildings. Manchester : 9, Mount Street.

Langstaff, Ehrenberg and Pollak. London : Leadenhall Buildings, E.C. 3.

Thomas Meadows & Co., Ltd. London : 35, Milk Street, Cheapside, E.C. 3. Leicester : 39, London Road. Liverpool : 22, Water Street. Manchester : 196, Deansgate. Bradford : 21, Forster Square. Glasgow : 114, Hope Street. Southampton : 14, Canute Road. Birmingham : 1-2, Ludgate Hill.

Morrison, Pollexfen and Blair, Ltd. London : 90, Fenchurch Street, E.C. 3.

Neale and Wilkinson, Ltd. Liverpool : 21, Water Street. Birmingham : Theatre Royal Chambers, New Street. Bristol : 8, Queen Street.

Pickfords, Ltd., 9, St. Helen's Place, London, E.C. 3.

Pitt and Scott, Ltd. London : 25, Cannon Street, E.C. 4.

G. W. Sheldon & Co., Ltd. London : 88, Leadenhall Street, E.C. 3.

Stockwell & Co., Ltd. London : 16, Finsbury Street, E.C. 2 ; 8, Beak Street, W. 1.

Van Oppen & Co., Ltd. London : 28, Bartholomew Close, E.C. 2. Liverpool : 15, South Castle Street. Manchester : 61, Bloom Street. Birmingham : 121, Snow Hill. Bradford : 68, Leeds Road. Leeds : 72A, Wellington Street. Bristol : Oxford Chambers, St. Stephen's Street. Leicester : High Street. Sheffield : 55, Norfolk Street.

Leopold Walford & Co., Ltd. London : 29, Great St. Helen's, E.C. 3 ; 123, Victoria Street, S.W. 1. Manchester : Lloyds Bank Building, King Street. Liverpool : Tower Building, Water Street. Bristol : Oxford Chambers, St. Stephen's Street.

George W. Wheatley & Co., Ltd. London : 95, Upper Thames Street, E.C. 4 ; 46-48, Beak Street, W. 1. Liverpool : 10, Dale Street. Glasgow : 43, Mitchell Street.

W. Wingate and Johnston, Ltd. London : 17-18, Aldersgate Street, E.C. 2 ; 11-12, Falcon Avenue, E.C. 1. Liverpool : 17, Brunswick Street. Glasgow : 62, Buchanan Street. Manchester : 59, Mosley Street. Southampton : Oxford House, Oxford Street. Bradford : 61, King's Arcade.

V.—THE CUSTOMS TARIFF AND THE PREPARATION OF CUSTOMS INVOICES.

British firms who are setting about securing orders for the Canadian market should take particular care, before shipping any goods, to familiarise themselves thoroughly with the regulations laid down by the Customs authorities in regard to the preparation of invoices. An initial error in connection with what may seem to the shipping clerk a minor matter may thoroughly exasperate the prospective customer on the other side of the Atlantic by necessitating a long wait for delivery of the goods pending the arrival of corrected invoices. In order to prevent such unfortunate delays, a prominent firm of importers and manu-

facturers' agents in Canada has printed the following notes on the back of its order forms :—

“ The following instructions must be complied with. Non-observance may cause vexatious delays and useless expense, and may even necessitate the storage of the goods in bond at shippers' expense and risk, pending the arrival of correct documents, which will be telegraphed for. All expenses incurred through shippers' neglect or incorrect documents will be charged to shipper.

“ Unless specifically ordered we will pay no insurance charges on goods from overseas, as these goods are protected by our own policies.

“ Invoices must be in triplicate, properly certified, and sent to us by mail without delay. Invoices must be sent with every shipment.

“ Country of origin must be stated on the face of the invoice. (The word ' British ' is not sufficiently definite.) Use separate sets of invoices for goods entering under British, Intermediate, or General Tariffs, with the proper declarations for each class of goods.*

“ Canadian Customs Regulations require that all invoices be made in two-column form, headed respectively :—‘ Fair market value as sold for home consumption at time of shipment ’ ; ‘ Selling price to customer in Canada.’ Even though prices are alike, both columns must be filled in.

“ Deduct on invoice all discounts, trade, and cash, showing net amount.

“ The number of packages and the contents of each case, and its distinguishing marks or number, must be clearly shown on invoice.

“ Declare a nominal value for free samples and electros, or they will be assessed by the Customs authorities, and invoice them ‘ no charge.’

“ State on the invoice the net weight of all printed matter or catalogues and the superficial area of electros or half-tones.

* Suspended Jan. 12th, 1922, pending decision of new Parliament.

“ Enclosures from other houses must be marked on invoice.

“ Do not fail to state by what route or vessel goods are shipped.

“ If goods are sent on consignment, a special declaration is required, duly signed and witnessed.

“ Individual handwritten signatures in ink are required to all certificates.

“ Certificates must be on invoice paper ; if pasted or attached, the invoice is void.

“ Nothing can be more annoying in a strictly Customs country like this than to receive goods—without invoices, with incorrect invoices, with invoices not properly certified, with invoices lacking particulars of route and packages, errors of over-charge, which entail payment of full duty on the error, or invoices lacking particulars of printed matter, samples, etc., which have to be weighed and assessed by the Customs authorities, entailing delay.”

While the expected revision of the Customs tariff has been postponed, it will, no doubt, take place after the 1921 General Election ; and it will, therefore, perhaps be more likely to mislead than to help British exporters to make any attempt to furnish in this booklet any detailed information regarding rates of duties on British goods. Such information can be readily obtained from the various officials of the Canadian Government in this country, the addresses of which are given below :—

The High Commissioner for Canada, 19, Victoria Street, London, S.W. 1.

The Canadian Trade Commissioner, 73, Basinghall Street, London, E.C. 2.

The Canadian Trade Commissioner, 31, North John Street, Liverpool.

The Canadian Trade Commissioner, 4, St. Ann's Square, Manchester.

The Canadian Trade Commissioner, Sun Buildings, Clare Street, Bristol.

The Canadian Trade Commissioner, 87, Union Street, Glasgow.

It may, however, be mentioned briefly that the tariff hitherto in force, *i.e.*, that of 1907, as amended to date, consists of various schedules covering the several categories of dutiable and free goods, and contains in three columns the rates of duty levied under (1) the British Preferential Tariff; (2) the Intermediate Tariff; and (3) the General Tariff. The General Tariff is self-explanatory, and applies to the majority of the countries of the world, notably to the United States and Germany.

The Intermediate Tariff is a "bargaining" tariff, and contains rates (usually lower than those in the General Tariff) which are applied to selected lists of goods emanating from countries enjoying "most-favoured nation" treatment in Canada, or which have special tariff arrangements with the Dominion. Countries so affected—in respect to some, though not to all, goods produced by them—are Argentina, Belgium, Colombia, Denmark, France, Italy, Japan, the Netherlands, Norway, Russia, Spain, Switzerland and Venezuela, as well as the Commonwealth of Australia, which does not enjoy the benefits of the British Preferential Tariff.

The British Preferential Tariff, as its name implies, is a special tariff—generally about one-third less than the General Tariff, though not consistently so—applying to goods imported into Canada from the United Kingdom, British India, the Union of South Africa, New Zealand, the British West Indies, and certain—though not all—of the British Crown Colonies. Goods intended for entry under preferential rates must be invoiced and packed separately from other goods, the forms in use being styled "M-B" and "N-B," the first-named being intended for goods sold to a customer in Canada prior to shipment by the exporter, and the latter for goods despatched on consignment to a Canadian agent prior to sale by him in the Dominion. Goods in respect of which intermediate tariff rates are to be claimed must be invoiced on forms "M-A" or "N-A," and

other goods, *i.e.*, those for which no special privilege is claimed, being subject to general tariff rates, are invoiced on forms "M" or "N" respectively.

For the information of exporters from the United Kingdom, forms "M-B" and "N-B," which are used in respect of goods shipped for entry under preferential rates, are reproduced on pp. 191-4.

The various declarations may, if desired, be printed, typewritten, written or stamped on firms' own bill-heads, *but should not be pasted thereon*; or ready-printed forms can be purchased from any of the under-mentioned printers in Great Britain:—

MR. J. BOSQUET, 28, Barbican, London, E.C. 1.

EDEN FISHER & CO., LTD., 6, 7 & 8, Clement's Lane, London, E.C. 3; 95, 96 & 97, Fenchurch Street, London, E.C. 3; Spencer House, South Place, Finsbury, London, E.C. 2.

J. A. GODFREY & SONS, LTD., 4, Little College Street, Dowgate Hill, Cannon Street, London, E.C. 4.

J. McQUEEN & Co., 15, Channel Street, Galashiels, Scotland.

POULTON BROTHERS, LTD., 38-39, Cowcross Street, London, E.C. 2.

A. C. SHAW & CO., LTD., 7, St. John's Lane, Clerkenwell, London, E.C. 1.

SAMUEL STRAKER & SONS, 36, Fenchurch Street, London, E.C. 3; 22, Leadenhall Street, London, E.C. 3; 56, 56A, 60 & 62, Commercial Street, London, E. 1.

WATERLOW BROTHERS AND LAYTON, LTD., 24-25, Birchin Lane, London, E.C.; Broken Wharf, Upper Thames Street, E.C. 4; 40, King Street, Covent Garden, London, W.C. 1.

WATERLOW & SONS, LTD., 26 & 27, Great Winchester Street, London, E.C. 2; 85-86, London Wall, London, E.C. 2; 52, New Broad Street, E.C. 2; 49, Parliament Street, S.W. 1; 6, Cannon Row, London, S.W. 1; Temple Row, Birmingham.

WILLIAM WILSON & CO. (CHEAPSIDE), LTD., 103, Cheapside, London, E.C. 2.

AS A MARKET FOR BRITISH GOODS 191

M-B.—*Specimen Form of Invoice for use in Connection with Goods intended for Entry under the British Preferential Tariff, when Sold by the Exporter prior to Shipment.*

(Place and Date)

INVOICE of _____ purchased by _____ of
from _____ of _____
per _____ to be shipped from _____

Name of the Country of Origin.	Marks and Numbers on Packages.	Quantities and Description of Goods.		Fair Market Value as Sold for Home Consumption at Time Shipped.	Selling Price to the Purchaser in Canada.	
					@	Amount.
Great Britain.						

The fair market value for home consumption at the time shipped shown on this invoice is £ _____ in paper currency, and is equivalent to £ _____ in gold sovereigns, as compared with the basis of \$ _____ to the pound sterling.

(Signature of seller or agent)

I, the undersigned, do hereby certify as follows :—

(2) That the said invoice is in all respects correct and true ;

(4) That the said invoice also exhibits the fair market value of the said goods at the time and place of their direct exportation to Canada and as when sold at the same time and place in like quantity and condition for home consumption in the principal markets of the country whence exported directly to Canada, without any discount or deduction for cash, or on account of any drawback or bounty, or on account of any royalty actually payable thereon or payable thereon when sold for home consumption but not payable when exported, or on account of the exportation thereof or for any special consideration whatever; and that such fair market value is not lower than the wholesale price of the said goods at the said time and place; and that in the case of new or unused goods, such fair market value is not less than the actual cost of production of similar goods at said time and place, plus a reasonable profit thereon;

(6) That no arrangement or understanding affecting the purchase price of the said goods has been or will be made or entered into between the said exporter and purchaser or by any one on behalf of either of them, either by way of discount, rebate, salary, compensation, or in any manner whatsoever other than as shown in the said invoice.

(B) That each article on this invoice is *bonâ fide* the produce or manufacture of a country entitled in Canada to the benefits of the British preferential tariff and specified on the invoice as its country of origin, and that each manufactured article on the invoice in its present form ready for export to Canada has been finished by a substantial amount of labour in such country and not less than one-fourth the cost of production of each such article has been produced through the industry of one or more British countries.

Dated at this day of 19 .

(Signature) _____

(a) Insert the word partner, manager, chief clerk or principal official, giving rank as the case may be.

AS A MARKET FOR BRITISH GOODS 193

N-B.—*Specimen Form of Invoice for use in Connection with Goods intended for Entry under the British Preferential Tariff, when Shipped on Consignment without Sale by the Exporter.*

(Place and Date)

INVOICE of _____ consigned by _____ of _____
to _____ of _____ to be shipped from _____ per _____

Name of the Country of Origin.	Marks and Numbers on Packages.	Quantities and Description of Goods.		Fair Market Value as Sold for Home Consumption at Time Shipped.	
				@	Amount.
Great Britain.					

The fair market value for home consumption at the time shipped shown on this invoice is £ _____ in paper currency, and is equivalent to £ _____ in gold sovereigns, as compared with the basis of \$ _____ to the pound sterling.

(Signature of owner or agent)

BACK.

(To be attested to in British Countries before a Collector of Customs, Notary Public or other official authorised to administer Oaths ; and in other Countries before a British or other Consul, Notary Public or other official authorised to administer Oaths.)

I, (a) of (b) do solemnly and truly declare as follows :—
 (1) That I am (c) the owner of the goods shipped on consign-
 ment to (d) at in Canada, and described in the annexed
 invoice ;

(2) That the said invoice is a complete and true invoice of all the goods included in this shipment ;

(3) That the said goods are properly described in the said invoice ;

(4) That there is included and specified in the said invoice the true value of all cartons, cases, crates, boxes and coverings of any kind, and all charges and expenses incident to placing the said goods in condition packed ready for shipment to Canada ;

(5) That none of the said goods have been sold by or on behalf of the owner aforesaid to any person, firm or corporation in Canada ;

(6) That the said invoice contains a just and faithful valuation of such goods, at their fair market value, as sold for home consumption in the principal markets of the country whence the same are exported directly to Canada, and that such fair market value is the price at which the said goods are freely offered for sale in like quantity and condition by me or by dealers therein to purchasers in said markets in the ordinary course of trade at the usual credit, without any discount or deduction for cash, or on account of any drawback or bounty, or on account of any royalty actually payable thereon, or payable thereon when sold for home consumption, but not payable when exported, or on account of the exportation thereof, or any special consideration whatever ; and that such fair market value is not lower than the wholesale price of the said goods at the said time and place ; and that in the case of new or unused goods, such fair market value is not less than the actual cost of production of similar goods at said time and place, plus a reasonable profit thereon ;

(7) That if the value for duty of any goods as stated in this invoice is other than the value thereof as above specified, such value for duty has, to the best of my knowledge and belief, been fixed and determined under the authority of the Customs Act at the value stated in the said invoice ; and

(8) That no different invoice, or account thereof, has been or will be furnished to any one by me or on my behalf.

(B) That each article on this invoice is *bonâ fide* the produce or manufacture of a country entitled in Canada to the benefits of the British preferential tariff and specified on the invoice as its country of origin, and that each manufactured article on the invoice in its present form, ready for export to Canada, has been finished by a substantial amount of labour in such country, and not less than one-fourth the cost of production of each such article has been produced through the industry of one or more British countries.

Declared at this day of 19 before me .
 (Signature) .

(a) Name of party subscribing to this declaration.

(b) City or town and country.

(c) A member of the firm of , giving the name of the firm when the shipment is made by a firm ; or an officer, director or manager of , giving the name of the corporation when the shipment is made by a corporation.

(d) Name of consignee.

Certified invoices, *in duplicate*, are required for customs entry in addition to the one intended for the customer himself, and all of these documents should be sent by the exporter by mail to his customer or agent.

Firms filling up the "M-B" forms will note that it is necessary to indicate not only the "Selling Price" to their customer in Canada, but also the "Fair Market Value of the goods at the Time and Place of Shipment," this being interpreted in the Customs Act as "such value in no case to be lower than the wholesale price thereof at such time and place," the value for duty of new and unused goods to be "in no case less than the actual cost of production of similar goods at date of shipment direct to Canada, plus a reasonable profit thereon." This "fair market value" is the figure on which Customs duty is appraised except in the unusual case of the "Selling Price" being higher than the home consumption price, when for revenue purposes duty is assessed on the selling price to the customer in Canada. Invoices must be made out in the currency of the country from which they are exported, *i.e.*, for Great Britain, in sterling funds, except in the case in which the selling price has been quoted to the customer in dollars, or in any other currency, when this must be adhered to in preparing that column, the "fair market value," however, being still in sterling. Since July 22nd, 1920, the Canadian Customs authorities have been conceding to British firms the advantages accruing to them by the depreciation of sterling funds in Canada, and the fair market value expressed in the ordinary paper currency (Treasury Notes) of the United Kingdom may be reduced to its assumed "gold equivalent as compared with the Canadian dollar" by a calculation based on the exchange rates current on the date of the invoice, *e.g.* :—

Fair market value \times rate of exchange on date of shipment \div the gold par of exchange, \$4.866.

The following declaration signed by the exporter is

added to the other information on the front of the invoice, and in this example is worked out for goods whose fair market value on the date of shipment is £75 6s. 8d., the exchange rate on that day being \$4.25 = £1.

“The fair market value for home consumption at the time shipped shown on this invoice is £75 6s. 8d. in paper currency, and is equivalent to £65 15s. 9d. in gold sovereigns, as compared with the basis of \$4.25 to the pound sterling.”

The Sales Tax.—In addition to the rates of customs duty levied on the fair market value for home consumption of goods exported to Canada, there is an additional excise tax charged on the duty-paid value when landed on the other side, and amounting to $2\frac{1}{2}$ per cent. of such gross value in the case of goods (with some exceptions, including foodstuffs) consigned to a wholesaler or retailer for resale; or to 4 per cent. when shipped to the consumer direct.

* *The Marking of Goods.*—On and after December 31st, 1921, “all goods imported into Canada which are capable of being marked, stamped, branded or labelled, without injury, shall be marked, stamped, branded or labelled in legible English or French words, in a conspicuous place that shall not be covered or obscured by any subsequent attachments or arrangements, so as to indicate the country of origin.” The said marking shall be as nearly indelible and permanent as the nature of the goods will permit, and goods imported into Canada “which do not comply with the foregoing requirements shall be subject to an additional duty of 10 per cent. *ad valorem* to be levied on the value for duty purposes and in addition such goods shall not be released from Customs possession until they have been so marked” under Customs supervision at the expense of the importer. The intention of this new provision is obviously to enable the ultimate purchaser to distinguish between British goods and those imported from

* Suspended and likely to be repealed.

foreign countries, and should tend to assist firms in the United Kingdom to sell their products in the Canadian market in competition with such countries as Germany, the United States, etc.

VI.—CANADIAN BANKING FACILITIES.

The system of banking in force in the Dominion of Canada is one which has received high praise from experts of many countries who have studied the flexible manner in which the credit necessary to the movement of enormous quantities of agricultural and other products, concentrated in a few months of the year, as well as the ordinary business transactions of the country, is arranged. The Canadian banks have perfect control of the credit system by reason of the fact that there are but eighteen chartered banks in the Dominion, these having nearly 5,000 branches located all over the country as well as in the neighbouring Dominion of Newfoundland, and in Great Britain and many foreign countries as well. Commercial paper transactions such as are common in the United States and elsewhere are but little used in Canada and, therefore, there is no field for the bill broker. Credit granted by the trader takes the form of book accounts or promissory notes. Drafts running from sight to 120 days are drawn by the seller upon the buyer under a wide and well-established practice. The drafts are then either discounted at the bank of the drawer or are forwarded through a branch for collection, and after acceptance are held until maturity. This is known in Canada as "two-name" paper. The principal circulating medium is bank-notes, and the combination of the branch bank system with freedom of action, within prescribed limits, in regard to note issues, gives to Canada a remarkably flexible banking machinery. A bank receiving deposits at Halifax, Montreal and Toronto may lend them the following day through its branches, and by the issue of its own notes, at far western points, the branches

redeeming the notes, when presented, by drafts upon the head offices. Thus it is possible to keep the rate of interest in the interior, and in far western points within one-half to 1 per cent. of rates prevailing in the large cities of the east on the same line of credits. Canadian branch bank expansion during 1920, while only half that of 1919—when many war arrears had to be made up—was on a generous scale, some 400 new offices having been opened. Canadian banks had at the end of 1920 a branch to every 1,800 inhabitants, a ratio not equalled in any other country in the world.

In addition to their branches in the Dominion, the chartered banks have branches or agencies in the United Kingdom, the United States, France, Spain, Italy, the West Indies, Cuba, Mexico, Central and South America, Newfoundland, and, in co-operation with an American Bank, in the Far East as well. During the past few years a new era has begun in the foreign policy of Canadian banks. At no time have so many branches been established or so many international alliances been formed. Canadian bankers have, in effect, declared that exporters shall have every facility extended to them to secure foreign markets, and in many instances the bankers have been the first to enter the new field and have opened the way to trade expansion.

The following particulars for December, 1920, regarding the Canadian chartered banks may be of interest :—

\$

Total bank clearings for the		
Dominion . . . . .	.	20,283,555,305
Total deposits on demand . . . . .	.	686,754,094
Total deposits after notice . . . . .	.	1,292,009,008
Current loans in Canada . . . . .	.	1,357,973,118
Current loans elsewhere . . . . .	.	169,677,657
Loans to municipalities . . . . .	.	65,487,171
Call loans in Canada . . . . .	.	108,471,340
Call loans elsewhere . . . . .	.	218,183,194
Note circulation . . . . .	.	253,576,534

These figures, it may be remarked, reflect declining business and easy money at a time when Canada, like every other in the world, was going through the process of price deflation, the above figure for current loans being a decline from \$1,417,520,756 in September, 1920.

There are eighteen chartered banks in Canada, the respective strength and importance of which may be judged from the particulars given in the table on p. 200 regarding their capital reserves and note circulation.

The following is a list of the Canadian Banks which had offices in London at the date of publication of this work :—

The Bank of Montreal, 47, Threadneedle Street, London, E.C. 2. (West End Offices : 9, Waterloo Place, Pall Mall, S.W. 1.)

The Canadian Bank of Commerce, 2, Lombard Street, London, E.C. 3.

The Royal Bank of Canada, 2, Bank Buildings, Princes Street, London, E.C. 2.

The Union Bank of Canada, 6, Princes Street, London, E.C. 2. (West End Offices : 26, Haymarket, S.W. 1.)

The Dominion Bank, 73, Cornhill, London, E.C. 3.

The Bank of Nova Scotia, 55, Old Broad Street, E.C. 2.

In addition to the above, most important among the Canadian banking institutions, the under-mentioned banks are represented in the United Kingdom by the following joint stock banks and branches :—

The Bank of Hamilton. (London : The National Provincial and Union Bank of England, Ltd.)

The Home Bank of Toronto. (London : The National Bank of Scotland, Ltd.)

The Imperial Bank of Canada. (London : Lloyds Bank, Ltd.)

Canadian Chartered Banks.

Banks.	Capital.			Reserves.	Note Circulation.
	Authorised.	Subscribed.	Paid up.		
Bank of Montreal	\$ 28,075,000	\$ 22,000,000	\$ 22,000,000	\$ 22,000,000	\$ 39,839,768
Bank of Nova Scotia	15,000,000	9,700,000	9,700,000	18,000,000	21,004,637
Bank of Toronto	10,000,000	5,000,000	5,000,000	6,000,000	7,884,328
The Molson's Bank	5,000,000	4,000,000	4,000,000	5,000,000	6,131,293
Banque Nationale	5,000,000	2,000,000	2,000,000	2,300,000	6,397,280
Merchants' Bank of Canada*	15,000,000	10,169,100	10,029,622	8,400,000	15,733,252
Banque Provinciale du Canada	5,000,000	3,000,000	2,936,869	1,300,000	3,133,268
Union Bank of Canada	15,000,000	8,000,000	8,000,000	6,000,000	11,366,194
Canadian Bank of Commerce	25,000,000	15,000,000	15,000,000	15,000,000	29,766,859
Royal Bank of Canada	25,000,000	20,400,000	20,163,960	20,148,985	40,596,168
Dominion Bank	10,000,000	6,000,000	6,000,000	7,000,000	9,159,886
Bank of Hamilton	5,000,000	4,998,200	4,970,300	4,685,150	6,183,431
Standard Bank of Canada	5,000,000	3,552,493	3,552,493	4,539,370	6,763,493
Banque d'Hochelega	10,000,000	4,000,000	4,000,000	4,000,000	7,645,604
Imperial Bank of Canada	10,000,000	7,000,000	7,000,000	7,500,000	13,382,988
Home Bank of Canada	5,000,000	2,000,000	1,959,391	500,000	2,131,375
Sterling Bank of Canada	3,000,000	1,266,600	1,229,574	450,000	1,208,273
Weyburn Security Bank	1,000,000	655,700	524,560	225,000	430,490
	197,075,000	128,742,093	128,066,769	133,048,505	228,758,587

* Amalgamated (1922) with Bank of Montreal.

La Banque d'Hochelaga. (London : The Clydesdale Bank, Ltd.)

La Banque Nationale. (London : The London County, Westminster and Parr's Bank, Ltd.)

La Banque Provinciale du Canada. (London : Lloyds Bank, Ltd.)

The Molson's Bank. (London : The London County, Westminster and Parr's Bank, Ltd.)

The Standard Bank of Canada. (London : Barclay's Bank, Ltd.)

The Sterling Bank of Canada. (London : The Commercial Bank of Scotland.)

The Bank of Toronto. (London : The London Joint City and Midland Bank, Ltd.)

There are in Canada, further, about twenty-five companies doing business similar in its general character to the trust company business as known in the United States—or that of the Public Trustee in the United Kingdom. They also act as agents for their clients in the investments of moneys, the collection of dividends, coupons and other income ; as agents to buy or sell real estate ; as trustees for corporations, for registering and countersigning certificates of incorporation and as trustees for the bond issues of corporations. Of these companies, the undermentioned are represented in London :—

The Bankers' Trust Company, 53, Cornhill, E.C. 3.

The Montreal Trust Company, 2, Bank Buildings, Princes Street, E.C. 2.

The National Trust Company, 28, Bishopsgate, E.C. 2.

The Prudential Trust Co., Ltd., 14, Cornhill, E.C. 3.

The Royal Trust Company, 47, Threadneedle Street, E.C. 2.

The Union Trust Company, 57, Bishopsgate, E.C. 2.

The larger Canadian trust companies have branches in the chief cities of the Dominion.

Currency.—The Canadian monetary system is based on the British gold standard, with a subsidiary silver,

nickel and bronze coinage, the coinage being struck at the Ottawa branch of the Royal Mint. Little gold circulates, and superimposed upon the gold foundation is a mixed " Dominion Note " and Bank Note currency. The Dominion Government is authorised to issue currency notes known as " Dominion " notes up to the amount of \$50,000,000 (this figure having been exceeded during the war as a temporary measure), against a reserve of gold equal to one-quarter of that amount, and to any amount beyond this limit of \$50,000,000 against an equal amount of gold. " Dominion " notes are issued, as follows: \$1, \$2, \$50, \$100, \$500, and \$1,000; and the following coins are issued by the Ottawa Royal Mint: Gold, \$10, \$5, and the British sovereign; silver, 50 c., 25 c., 10 c. and 5 c.; bronze, 1 c. Under the Dominion Currency Act a legal tender may be made in Canadian copper coins up to 25 c.; Canadian silver coins to the amount of \$10; and gold coins and Dominion notes up to any amount. The British sovereign is legal tender for \$4 86 $\frac{2}{3}$ c. In addition to the bank notes in universal use in Canada, the leading express companies issue money orders payable at par everywhere in Canada, these being obtainable at railway stations and elsewhere and exchangeable for cash or goods anywhere in the Dominion. Circular letters of credit are issued by the banks, these being accompanied by letters of introduction bearing the signature of the payee, and also a list of agents and correspondents where the money may be drawn. The letter of credit is not negotiable, and contains a request that the drafts upon the same shall be negotiated at the current rate of the day, less the usual charges. All Canadian banks issue drafts upon their correspondents in the Dominion and other countries at the current rates of exchange, and also bankers' money orders payable at any bank in Canada. Some banks issue money orders payable at the office of their foreign correspondents. Foreign limited cheques and travellers' cheques are also mediums of carrying funds familiar to Canadian business men.

The prevailing rates of exchange between Montreal and London are quoted every day by the principal newspapers in this country.

Credit reports are largely used by all classes of business men in Canada, and British firms could obtain them, either directly or through their own bankers, from the Canadian banks in London or from the London offices of the Mercantile agencies :—

Messrs. R. G. Dun & Co., King's House, King Street, E.C. 2.

The Bradstreet Company, 137, Cheapside, E.C. 2.

VII.—MISCELLANEOUS INFORMATION OF VALUE TO BRITISH EXPORTERS TO CANADA.

Cable Rates and Cable Systems.—It is not generally known that the British Government has its own submarine cable between the United Kingdom and Canada. This system—"the Imperial Cable"—is worked direct from the Central Telegraph Office in London to Halifax, Nova Scotia, and carries traffic for Canada, the British West Indies, Australia, New Zealand and a number of islands in the Pacific Ocean. At Halifax connection is made with the Canadian Pacific Railway Company's telegraphs to all parts of Canada and to the United States. The full ordinary rates, for which a specially quick service is provided, are the same as those of the other cable routes, and there is also a deferred rate to the eastern Provinces of Canada at $4\frac{1}{2}d.$ a word (with proportionately low rates to the western Provinces). To send messages by this route cables should be handed in at any post office, marked "*viâ* Imperial." Apart from the Government service, the following companies have offices at which cablegrams for Canada can be accepted for transmission :—

The Commercial Cable Company, 63, Gracechurch Street, London, E.C. 3.

The Western Union Telegraph Company, Western

Cable Rates for Canada and Newfoundland.

DESTINATION.	Rate per word for Ordinary and Deferred telegrams. (Deferred telegrams must be in plain language, and are accepted on condition that they may, if necessary, be deferred during transmission in favour of Full-rate telegrams.)			
	ORDINARY.		DEFERRED RATE. The indication "LCO." or "LCF" is counted and charged for. These rates are not available for radiotelegrams.	
	<i>Viâ</i> Imperial, Anglo- American, French Co., Western Union, or Commercial Co.	<i>Viâ</i> Marconi.	<i>Viâ</i> Imperial, or Marconi.	<i>Viâ</i> Anglo- American, Western Union, or Commercial Co.
1.	2.	3.	4.	5.
*CANADA—	s. d.	s. d.	s. d.	s. d.
Alberta . . .	1 6	1 3	0 7½	0 9
British Columbia—				
First Zone . .	1 6	1 3	0 7½	0 9
Second Zone . .	1 8	1 5	0 8½	0 10
Third Zone . .	1 9	1 6	0 9	0 10½
Fourth Zone . .	1 11	1 8	0 10	0 11½
Fifth Zone . .	2 1	1 10	0 11	1 0½
Sixth Zone . .	2 4	2 1	1 0½	1 2
Seventh Zone . .	2 9	2 6	1 3	1 4½
Eighth Zone . .	3 1	2 10	1 5	1 6½
Ninth Zone . .	3 2	2 11	1 5½	1 7
Cape Breton . .	1 0	0 9	0 4½	0 6
Manitoba . . .	1 5	1 2	0 7	0 8½
New Brunswick . .	1 0	0 9	0 4½	0 6
Nova Scotia . .	1 0	0 9	0 4½	0 6
Ontario Province . .	1 0	0 9	0 4½	0 6
Prince Edward Island . .	1 0	0 9	0 4½	0 6
Quebec Province . .	1 0	0 9	0 4½	0 6
Saskatchewan . .	1 6	1 3	0 7½	0 9
Yukon—				
First Zone . .	2 4	2 1	1 0½	1 2
Second Zone . .	2 7	2 4	1 2	1 3½
Third Zone . .	2 9	2 6	1 3	1 4½
Fourth Zone . .	3 2	2 11	1 5½	1 7
NEWFOUNDLAND—				
All places except those in Labrador . . .	1 0	0 9	—	0 6
Labrador . . .	1 2	0 11	—	0 8

* The telegraph and postal services in Canada are quite distinct, and it is desirable that telegrams addressed "Post Office," or "Poste Restante," should be registered.

Union House, Great Winchester Street, London, E.C. 2.

Telegraphic communication between Great Britain and Canada is also maintained by the Marconi Wireless Telegraph Company (1, Fenchurch Street, E.C. 3), the traffic being handled by the high-power stations at Clifden (Ireland) and Glace Bay (Nova Scotia).

The table on p. 204 is a complete schedule of cable and wireless telegraph rates between Great Britain and Canada.

The *Letter and Parcels Post Rates* between Great Britain and Canada are given on pp. 206 and 207.

COMMERCIAL LAW IN CANADA.

The Bankruptcy Act.—Until the coming into force on July 1st, 1920, of the new Bankruptcy Act of the Dominion, Canada had no effective legislation of this kind, but, under this statute, which applies to all corporations, with the exception of banks, railways, trust and insurance companies, and to all persons except farmers and wage-earners earning less than \$1,500 per annum, an insolvent debtor may make to an "authorised trustee" an assignment of all his property for the general benefit of his creditors. The Act further provides that a creditor or several creditors together having a claim of \$500 or more, and knowing a debtor to be insolvent and unable to collect his account, may apply to the court to have the debtor adjudicated a bankrupt. The circumstances of the case will be adjudicated upon by the court, which may dismiss the petition of the creditor, may stay the proceedings, or may grant an order, as the case may warrant. It provides that a debtor who has made an assignment shall be known as "an assignor"; a debtor who has been forced into bankruptcy by his creditors shall be known as a "bankrupt"; and provides for the discharge of an honest debtor who has turned over his assets for the benefit of his creditors.

LETTER

Letter Postage from United Kingdom.	Route.	Frequency of Service.	Homeward Mails due at Port of Arrival.
2d. first oz. and 1½d. each oz. after.	By direct packet. <i>Via</i> United States.	About once a week. About twice a week.	} At frequent intervals.

PARCEL

Route and Approximate Course of Post.	Frequency of Service.	Rates of Postage from United Kingdom.				Limits of		
		Parcels not exceeding				Insured Value.	Size.	
		2 lb.	3 lb.	7 lb.	11 lb.		Length, Breadth or Depth.	Length and Girth combined.
By direct packet (10 days to Halifax, 16 days Vancouver).	About once a week.	2 0	2 0	3 6	5 0	Parcel post insurance came into effect in Canada on October 1st, 1921. Parcels will be insured against loss up to the value of \$100. Fees range from three to thirty cents.	ft. 2½	ft. 6

POSTAGE.

Limit of Insured Value for Letters.	Limits of Weight.		Limitations of the Service and General Observations.
	Printed and Commercial Papers.	Samples.	
No service by any route.	5 lb.	5 lb.	PROHIBITED ARTICLES.—Spirits, whether sent as samples or otherwise; adulterated tea; prison-made goods; trade labels in metal.

POST.

Customs Declaration.	Limitations of the Service and General Observations.
A	<p>PROHIBITIONS.—Letters; adulterated tea; prison-made goods; trade labels in metal; potatoes; all nursery stock, including trees, shrubs, plants, vines, grafts, scions, cuttings or buds. Parcels containing bulbs, greenhouse-grown florists' stock, cut flowers, herbaceous perennials and bedding plants are, however, admitted if accompanied by a detailed statement of the contents. Intoxicating liquors.</p> <p>OBSERVATIONS.—No compensation is paid in respect of loss or damage of parcels or their contents. In respect of all parcels of merchandise the addressee must submit to the Customs authorities at the port of destination certified invoices in duplicate in the form prescribed by them. These invoices must be forwarded by the sender separately from the parcels.</p> <p>When the sender wishes to undertake payment of the Customs and other charges, a deposit of 1s. for every 2s. or fraction of 2s. of the value of the parcel, with a minimum deposit of 5s., is required.</p> <p>All parcels are conveyed in ordinary mail bags, and, to prevent injury, should be very strongly packed.</p> <p>Parcels measuring as much as 3 ft. 6 in. in length, but not exceeding 6 feet in length and girth combined, are admitted, provided that the contents are articles, such as umbrellas, golf clubs, etc., which cannot be divided and packed in shorter parcels.</p>
A	Customs declaration required. Adhesive form used.

Under the Act trustees to administer it are appointed by the Secretary of State at Ottawa. These are mainly trust companies, chartered accountants and associations of business men formed for purposes which make them suitable as trustees for bankrupt properties. In a number of cases the same company or the same association has qualified to act as trustee in most of the nine Provinces of Canada, but it is entered separately as a new trustee each time. Very little of the administrative machinery of the Act remains at Ottawa beyond the naming of the trustees by the Secretary of State, and the naming by the Minister of Justice of the judges to preside on bankruptcy matters. The officials, such as the registrars of the courts, are appointed by the Chief Justice of the Province concerned.

Registration of Companies.—A company may be registered with the Secretary of State at Ottawa, with authority to carry on operations throughout the Dominion, or application may be made to the Government of any Province for authority to operate within the boundaries of such Province only. A Dominion company may not commence operations before 10 per cent. of the authorised capital has been subscribed and paid, and the following fees are payable :—

When the authorised capital is \$50,000 or less, \$100.

When the authorised capital is between \$50,000 and \$200,000, \$100 plus \$1 for every \$1,000 or fractional part thereof in excess of \$50,000.

When the authorised capital is between \$200,000 and \$500,000, \$250 plus 50 c. for every \$1,000 or fractional part thereof in excess of \$200,000.

When the authorised capital is over \$500,000, \$400 plus 20 c. for every \$1,000 or fractional part thereof in excess of \$500,000.

Every company having a share capital is required, on or before June 1st in every year, to make a summary as of date March 31st preceding, and to file in the Department of the Secretary of State at Ottawa

duplicate copies of the return, signed by the two capital officers of the company and verified by affidavit.

Copyright.—British publishers should bear in mind that the mere fact of publishing in the United Kingdom does not give them copyright in the Dominion of Canada, which has not accepted the Copyright Act of the United Kingdom. Particulars regarding the rules and forms respecting applications for copyright may be obtained from the High Commissioner for Canada in London, 19, Victoria Street, S.W. 1, or from the Registrar of Trade Marks and Copyrights, Department of Trade and Commerce, Ottawa, Canada.

Patents.—Application for the Canadian patent rights in an invention must be made to the Commissioner of Patents, Department of Trade and Commerce, Ottawa, Canada, and copies of the Rules and Forms of the Canadian Patent Office are obtainable on application to the High Commissioner for Canada, 19, Victoria Street, London, S.W. 1.

Passports are not required for landing in Canada, but British subjects proceeding to the Dominion who intend subsequently to travel elsewhere or to return to the United Kingdom should provide themselves with passports before departure.

STANDARD TIME IN CANADA.

There are five divisions of standard time in the Dominion. Atlantic time is four hours behind Greenwich time, and Eastern, Central, Mountain and Pacific times represent an additional hour each to the retardation on the time in this country. The names given indicate approximately the boundaries within which standard time is accepted, but for convenience the various railway systems determine the time between terminal points on their lines. When it is noon at Greenwich it is 8 a.m. Atlantic time at Halifax; 7 a.m. Eastern time at Montreal and Toronto;

5 a.m. Mountain time at Regina ; and 4 a.m. Pacific time at Vancouver.

WEIGHTS AND MEASURES IN CANADA.

The British Trade Commissioner at Toronto recently found it necessary to remind manufacturers in the United Kingdom that, in submitting quotations to Canadian firms for ton lots, they should specify whether the English long or the Canadian short tons are intended. The legal Canadian scale of weights and measures provides for a ton of 2,000 lb. and a cwt. of 100 lb., and the value of a tender is nullified by the omission of a clear indication as to whether a Canadian or an Imperial ton is intended. Most of the other measures in use in the United Kingdom, including the Imperial yard and the Imperial gallon of 277·27384 cubic inches, are identical in the Dominion.

CANADIAN LAWYERS IN LONDON.

British exporters who from time to time require information regarding legal points pertaining to transactions in Canada may be reminded that in the reference library at the office of the High Commissioner for Canada, 19, Victoria Street, S.W. 1, there are complete sets of the Statutes of the Dominion Parliament, and of each of the Provincial Legislatures. The following Canadian solicitors practising in London are in a position to afford legal advice where this is required :—

J. G. Archibald, Esq., 107, Eaton Terrace, S.W. 1.

A. C. Forster-Boulton, Esq., 1, Essex Court, Temple, E.C. 4.

Messrs. Freeman, Moss and Latimer, 17, Victoria Street, S.W. 1.

Arthur Johnson, Esq., Messrs. Sutton, Ommanney and Oliver, 3-4, Great Winchester Street, E.C. 2.

Keen, Rogers & Co., 59, Carter Lane, E.C. 4.

Linklaters and Paines, 14, St. Helen's Place, E.C. 3.

Alexander Macnab, Esq., Messrs. Norton, Rose, Barrington & Co., 57½, Old Broad Street, E.C. 2.

S. H. Peddar, Esq., 74, Holland Park, W. 11.

Messrs. Redden and Booth, 17, Victoria Street, S.W. 1.

The following list of Commissioners for taking oaths and affidavits for use in Canadian courts is extracted from Kelly's Post Office London Directory for 1922 :—

George Edmund Joseph Hilario Barlow, Esq, 165, Fenchurch Street, E.C. 3.

John Reginald Queckett Bartlett, Esq. (for the Provinces of Ontario, Quebec, Manitoba, New Brunswick, Nova Scotia and Saskatchewan), 26-27, Bush Lane, Cannon Street, E.C. 4.

Bischoff, Coxe, Bischoff and Thompson, 4, Great Winchester Street, E.C. 2.

Herbert Z. Deane, Esq. (all the Provinces), 265, Strand, W.C. 2.

John Howard, Esq., 57, Pall Mall, S.W. 1.

Henry Josiah Humm, Esq. (British Columbia), 13, Old Jewry Chambers, E.C. 2.

Lawrence Jones, Esq. (Quebec, Ontario, Manitoba, Alberta and Saskatchewan), 16, St. Helen's Place, E.C. 3.

Charles Granville Kekewich, Esq. (Ontario, British Columbia, Saskatchewan, Alberta, Yukon), 2, Suffolk Lane, E.C. 4.

Last, Sons and Fitton, 17, Sackville Street, W. 1.

Sydney Hampden Peddar, Esq. (all Canadian Provinces), 74, Holland Park, W. 11.

John Proffitt, Esq., 13, Victoria Street, S.W. 1.

Howard Rumney, Esq. (all Canada), 6, John Street, Adelphi, W.C. 2.

Russell Stebbing, Esq. (British Columbia), 3-4, Great Winchester Street, E.C. 2.

Arthur Lockyer Rye, Esq. (Ontario, Quebec, Nova Scotia, New Brunswick, Manitoba, Prince Edward Island, Saskatchewan and Alberta), 13, Golden Square, W. 1.

DOMINION AND PROVINCIAL GOVERNMENTAL POWERS.

British firms may occasionally be at a loss to estimate the respective powers possessed in Canada by the Dominion Parliament at Ottawa, and by the various Provincial Legislatures and the Governments responsible thereto.

Speaking generally, the Dominion Parliament has power "to make laws for the peace, order and good government of Canada" in relation to all matters not assigned exclusively to the legislatures of the Provinces. In particular, the Dominion Parliament legislates for all Canada in respect to the following matters:—(1) taxation and borrowing for Federal purposes; (2) elections to the Dominion Parliament; (3) the Census; (4) naturalisation of aliens; (5) military and naval service and defence; (6) postal service; (7) Supreme Court, and the appointment and payment of Superior Court judges; (8) criminal law; (9) inter-provincial and foreign trade and commerce, including navigation and shipping, lighthouses, quarantine, general fishery regulations, etc.; (10) the general financial and commercial system—that is, currency and coinage, banks, paper money, legal tender, bills of exchange and promissory notes, interest, weights and measures and bankruptcy; (11) copyright and trade marks; (12) marriage and divorce; (13) public works, railway and steamship lines which are inter-provincial or for the general benefit of Canada; (14) Indians and Indian lands; (15) performance of international obligations accepted by the Dominion Government with or without consultation with the Government of the United Kingdom in London; (16) territories not within the Provinces, including the establishment of new Provinces.

The Executive Government is divided into the following departments, over each of which presides a member of the Cabinet :—

The Department of Justice (police, penitentiaries and the Supreme and Exchequer Courts).

The Department of Customs and Inland Revenue (collection of Customs and Excise duties).

The Finance Department (currency, loans, income tax, etc.).

The Insurance Department (under Minister of Finance).

The Department of Public Works (public works, Government telegraphs, etc.).

The Post Office Department.

The Department of Railways and Canals.

The Department of Militia and Defence.

The Department of the Interior (Dominion lands, land patents, water powers, natural resources intelligence, topographical surveys, maps, observatory, forestry, Dominion parks, irrigation).

The Department of Immigration and Colonisation.

The Department of Health (quarantine, pure foods, etc.).

The Department of External Affairs (Diplomatic Service).

The Department of Mines (explosives, geological survey, mines, fuel testing, etc.).

The Department of Indian Affairs.

The Department of the Secretary of State (archives, Civil Service Commission, correspondence between Dominion and Provincial Governments).

The Department of Marine (pilotage, wrecks, shipping, lighthouses, meteorological service, fisheries, Government Merchant Marine finance, etc.).

The Department of the Naval Service (dockyards, etc.).

The Department of Agriculture (experimental farms, health of animals, etc.).

The Department of Trade and Commerce (Dominion Bureau of Statistics, grain inspection, patents, trade marks, copyrights, commercial intelligence and publicity, bounties, steamship subsidies, scientific research).

The Department of Labour (Employment Exchanges, labour statistics, arbitration, etc.).

A Provincial Legislature may exclusively make laws in reference to (1) amendments to the provincial constitution (except as to the Lieutenant-Governor); (2) sale and management of public lands; (3) direct taxation and borrowing for provincial purposes; (4) provincial officials; (5) provincial elections; (6) municipal system; (7) licences of hotels, automobiles, etc.; (8) charitable institutions; (9) administration of justice in the Province; (10) education; (11) property and civil rights in the Province; (12) solemnisation of marriage, divorce; (13) local works; (14) companies with provincial objects; (15) matters generally of a provincial character.

CHAPTER VII

LIST OF CANADIAN IMPORTERS OF BRITISH GOODS

A LIST of importers in the Dominion of British goods can hardly be complete, especially in view of the strong probability that many firms in Canada whose relations have previously for the most part been with American houses will be actively seeking for British lines to substitute therefor in view of the situation which has developed as the result of the exchange disparity between the three countries concerned.

The large Canadian DEPARTMENT STORES are, however, big purchasers of British goods in connection not only with their city trade, but for the mail order section of their business, reaching buyers in remote country districts throughout the Dominion, and a number of these mentioned below have offices in London :—

The Arcade (Hamilton, Ontario), 10, Newgate Street, E.C. 1.

The T. Eaton Co., Ltd. (Toronto and Winnipeg). London : 7-7½, Warwick Lane, E.C. 4. Manchester : Orient House, Granby Row. Leicester : 1, Bowling Green Street. Belfast : 47-48, Scottish Temperance Buildings.

Goodwin's, Ltd. (Montreal), 10-13, Newgate Street, E.C. 1.

The Hudson's Bay Company (Winnipeg, Edmonton, Vancouver, Victoria, and Western and Northern Canada generally), 1, Lime Street, E.C. 3.

Manchester, Robertson and Allison, Ltd. (St. John), 2, Milk Street, E.C. 3.

The John Murphy Co., Ltd. (Montreal), 13-14, St. Paul's Churchyard, E.C. 4.

The G. W. Robinson Co., Ltd. (Hamilton, Ontario), 35, Milk Street, E.C. 3.

The Robert Simpson Co., Ltd. (Toronto and Vancouver), 13-14, St. Paul's Churchyard, E.C. 4.

David Spencer, Ltd. (Victoria and Vancouver), 1, Nicholl Square, E.C. 1.

Thibaudeau Brothers & Company (Quebec), 22, Basinghall Street, E.C. 2.

A valuable means of introducing British goods to the Canadian public in conjunction with an advertising campaign is to arrange with one of the great department stores in each city to display the articles in question for several days prior to distribution of supplies among the smaller merchants.

The Departmental Store is a great factor in the life of Canadian cities. It is considered quite legitimate that a manufacturer who confines his business to the wholesale trade should accept orders from the larger of these departmental stores, the reason being that these latter are able to buy goods in quantities equal to those purchased by many of the wholesalers.

A feature of the departmental stores in Canada is the fact that they are very heavy advertisers in the daily newspapers and vary the copy of their advertisements daily. They make a feature of advertising a reduction on a certain article for one day only, with a view to inducing purchasers to visit the stores personally. They achieve their result in a marked degree, for customers are induced to purchase many other articles while in the store. A visit to the departmental stores might almost be considered a part of the daily routine in the life of the average woman in the larger Canadian cities, with the consequence that the turnover of these stores is enormous.

Apart from the foregoing Department Stores having London Offices, the under-mentioned is a fairly comprehensive list* of the more outstanding import merchants in the principal Canadian business centres who may be expected to show interest in offers of British goods :—

HALIFAX, NOVA SCOTIA.

Names of Firms.	Street Address.	Business.
Austen Bros., Ltd. . .	118, Hollis Street. . .	Machinery and Engineering Supplies. Hardware and Sporting Goods. Cutlery, Hardware, Sporting and Electrical Goods. Hardware. Hardware, Mining and Mill Supplies.
A. M. Bell & Co., Ltd. .	131-133, Granville Street .	
Cragg Bros., Ltd. . .	505-507, Barrington Street	
Crowell Bros., Ltd. . .	81-83, Upper Water Street	
Mr. R. G. Dares . . .	Portland Street, Dartmouth.	

* While every reasonable care has been taken in the preparation of this list, the publishers do not accept any kind of responsibility in respect of the financial or commercial standing of any firms mentioned. Readers are therefore referred to their Bankers for status information respecting them.

Names of Firms.	Street Address.	Business.
Samuel Dobree & Sons .	77, Upper Water Street . (London : 7, Moorgate Street, E.C. 2.)	General Merchants.
A. J. Grant & Co., Ltd. . J. & M. Murphy, Ltd. .	65, Upper Water Street . Corner Duke and Hollis Streets.	Hardware. Dry Goods, Men's Furnishings, Carpets, etc. Hardware.
William Robertson & Son .	205-207, Upper Water Street.	Groceries.
A. & W. Smith & Co. . William Stairs, Son & Morrow, Ltd.	609, Barrington Street . 174-190, Lower Water Street.	Hardware and Ship Chandlery.
John Starr, Son & Co., Ltd. John Tobin & Co. . .	158, Granville Street. . 15-21, Upper Water Street	Electrical Goods. Groceries.
ST. JOHN, NEW BRUNSWICK.		
Brock & Paterson, Ltd. . The Eastern Electric Co., Ltd.	30-32, King Street . . 1, Dock Street . .	Millinery and Ladies' Wear. Electrical Goods.

The S. Hayward Co., Ltd..	30-52, Canterbury Street .	Hardware.
The J. M. Humphrey Co., Ltd.	12, King Street .	Footwear.
Macaulay Bros. & Co., Ltd.	65-75, King Street .	Dry Goods, Millinery and Men's Furnishings.
P. Nase & Son, Ltd. .	70-80, Bridge Street .	Groceries and Hardware.
Robertson, Foster & Smith, Ltd.	39-47, Dock Street .	Shelf Hardware, Cutlery, Paints, Glass, etc.
W. H. Thorne & Co., Ltd. .	44, Prince William Street .	Hardware, Silverware, Cutlery, Mill Supplies, etc.
Vassie & Co., Ltd. .	18-20, King Street .	Dry Goods.
QUEBEC.		
Jos. Amyot & Fils, Enreg. .	45, Dalhousie Street .	Fancy Goods.
Chinic Hardware Co. .	55-57, St. Peter Street .	Hardware.
Joseph Côté, Ltd. .	188, Saint Paul Street .	Groceries, Confectionery, Tobacco, etc.
Garneau, Ltd. .	71, Dalhousie Street .	Dry Goods.
Gauvreau, Beaudry, Ltd. .	48, St. Peter Street .	Dry Goods.
Langlois & Paradis .	19, St. James Street .	Groceries and Provisions.

Names of Firms.	Street Address.	Business.
Mr. D. Morgan . . .	12, St. Ann Street .	Dry Goods.
McCall, Shehyn & Son, Ltd.	71, St. Peter Street .	Dry Goods.
William McLimont & Son .	52, St. Peter Street .	Dry Goods.
The Mechanics Supply Co., Ltd.	80-90, St. Paul Street .	Electrical and other Mechanical Supplies.
Myrand & Pouliot, Ltd. .	215, St. Joseph Street .	Department Store.
The Paquet Co., Ltd. .	157-173, St. Joseph Street, St. Roch.	Department Store.
Renaud & Co., Inc. . .	72, St. Paul Street .	China, Glass and Earthenware.
J. B. Renaud & Co., Inc. .	104-150, St. Paul Street .	Groceries and Provisions.
H. S. Scott & Co. . .	60, St. Peter Street .	Hardware.
The Thomas Co., Ltd. .	94, Dalhousie Street .	China, Glass and Earthenware.
Whitehead & Turner, Ltd..	44-46, St. Paul Street .	Groceries and Provisions.
MONTREAL, QUEBEC.		
Almy's, Ltd. . . .	Corner St. Catherine and Bleury Streets.	Department Store.

Andrews, Gillespie & Co. .	335, Coristine Building (Liverpool: 5, Chapel Street.)	Groceries and Provisions.
Beauvais Frères .	336, St. Lawrence Boule- vard.	Hardware and Cutlery.
Bevan, Churchill & Co., Ltd.	Bank of Nova Scotia Building. (London: Finsbury Court, Finsbury Pavement, E.C. 2.)	General Merchants.
Henry Birks & Son .	Phillips Square .	Goldsmiths and Silversmiths.
British Merchants Inc., Ltd.	Room 317, 20, St. Nicholas Street. (London: 37, Eastcheap, E.C. 3.)	General Merchants.
The Brydges Co., Reg'd. .	189, St. James Street .	Machinery.
The James Buckley Co. .	St. Nicholas Building .	Machinery.
Canadian & Home Traders, Ltd.	97, St. James Street . (London: 61, Berners Street, W. 1.)	General Merchants.
Caverhill, Learmont & Co..	89, St. Peter Street .	Shelf and Heavy Hardware, Railway and Mill Supplies.
Couvrette-Sauriol, Ltée. .	114-116, St. Paul Street East.	Groceries.

Names of Firms.	Street Address.	Business.
Robert Davie (Senior), Ltd.	103, St. Francis Xavier Street (London : 124, Fenchurch Street, E.C. 3.)	Sacks and Bags.
Davies-Irwin, Ltd. . .	17, St. Sacrament Street .	General Merchants.
J. & P. Davignon, Ltd. .	(London : Capel House, New Broad Street, E.C. 2.) 1030-1036, Ontario Street East.	Hardware, Crockery, Elec- trical Apparatus, etc.
Dawson & Co., Ltd. . .	148, McGill Street . .	Electrical Goods.
Decatur, Bull & Co. . .	23, Jurors Street . .	Hardware.
Dorken Bros. & Co. . .	140, McGill Street . .	Cutlery and Tools.
Drummond, McCall & Co., Ltd.	28, Victoria Square . .	Iron and Steel, Metals.
Dupuis Frères, Ltd. . .	447, St. Catherine Street East.	Department Store.
Faucher & Fils . .	362, Craig Street West . .	Heavy Hardware.
Mark Fisher, Sons & Co. . .	28, Victoria Square . .	Dry Goods.
Frothingham & Workman, Ltd.	199, St. Paul Street West .	Hardware, Iron and Steel.
The General Supply Co. of Canada (Ottawa), Ltd.	211, McGill Street. . .	Machinery and Supplies.

Greenshields, Ltd. . .	17, Victoria Square . . (Manchester : Mr. J. Hop- kins, 14, St. Peter's Square.)	Dry Goods.
Harrisons & Crosfield, Ltd.	20, St. Nicholas Street . (London : 1, Great Tower Street, E.C. 3.)	General Merchants.
L. H. Hébert et Cie., Ltée. .	23, St. Paul Street East .	Hardware.
Hudon Hébert et Cie., Ltd.	De Bresoles and St. Sulpice Streets.	Groceries.
Hodgson, Sumner & Co., Ltd.	83-91, St. Paul Street West.	Dry Goods.
Israel & Oppenheimer, Ltd.	314, Notre Dame Street West.	Soft Goods.
A. G. Kidston & Co. . .	(London : 43, Bartholo- mew Close, E.C. 1.) Room 1004, 17, St. John Street. (London : 148½, Fenchurch Street, E.C. 3.)	Metals, etc.
F. W. Lamplough & Co. .	46, St. Alexander Street. .	Hardware and Cutlery.
Laporte-Martin, Ltd. . .	584, St. Paul Street West. .	Groceries.
A. C. Leslie & Co., Ltd. .	560, St. Paul Street West .	Iron and Steel Metals.

Names of Firms.	Street Address.	Business.
Lewis Bros., Ltd. . .	20, Bleury Street . .	Hardware, Electrical Goods, etc.
McIntyre, Son & Co., Ltd. .	13, Victoria Square . .	Dry Goods.
P. P. Martin & Co., Ltd. .	50, St. Paul Street West .	Dry Goods and Hardware.
Matthews, Towers & Co., Ltd.	10, St. Helen Street . .	Men's Furnishings.
Mercantile Import Co. .	341, Notre Dame Street West.	Dry Goods.
Henry Morgan & Co., Ltd..	Phillips Square . .	Departmental Store.
Munderloh & Co., Ltd. .	51, Victoria Square . .	Hardware, Metals, Electrical Goods.
Muser Bros. (Canada), Ltd..	12, St. Helen Street . . (London : Bickley & Bell, 16, New Union Street, E.C. 2.)	Laces, Trimmings, Dry Goods, etc.
Mussens, Ltd. . .	211, McGill Street . .	Railway, Mining, Muni- cipal and Contractors', Supplies.
James Ogilvy's, Ltd. . .	Corner St. Catherine and Mountain Streets.	Department Store.

The J. & N. Philips Co., Ltd.	518, St. Catherine Street West. (Manchester : 35, Church Street.)	Dry Goods.
Alphonse Racine, Ltd.	60-98, St. Paul Street West	Department Store.
George Reed & Co.	572, Ontario Street, Maison- neuve.	Hardware, Paints, Earthen- ware, etc.
W. Claire Shaw & Co.	11, St. Sacrement Street .	Drugs, Groceries and Hard- ware.
E. Cecil Short & Co.	38, St. Peter Street .	Metals, Pottery, etc.
Starke, Seybold, Ltd.	14-26, St. Peter Street .	Hardware.
C. R. Syder & Co., Ltd.	204, St. Nicholas Building . (London : 6, Broad Street Place, E.C. 2.)	General Merchants.
Tabah Cousins, Ltd.	209, Notre Dame Street East.	Dry Goods.
B. & S. H. Thompson & Co., Ltd.	McGill Building, 211, McGill Street. (London : 18-19, Gresham House, 24, Old Broad Street, E.C. 2.)	Hardware, Iron and Steel, Metals, etc.
Tooke Bros., Ltd.	302, De Courcelles Street .	Men's Furnishings.
Williams & Wilson, Ltd.	84, Inspector Street .	Machinery, Railway and Contractors' Supplies.

Names of Firms.	Street Address.	Business.
Wilson, Paterson & Gifford, Ltd.	127, Board of Trade Building.	General Merchants.
Witting Bros., Ltd. . .	307, St. James Street . (London : 49, Cannon Street, E.C. 4.)	General Merchants.
Yeates Machinery and Supply Co., Ltd.	16, Cathcart Street . .	Machinery and Engineering Supplies.

TORONTO, ONTARIO.

Aikenhead Hardware, Ltd..	17, Temperance Street	Hardware.
Anglo-Canadian Metals, Ltd.	46-50, Spadina Avenue	Iron and Steel, Metals.
J. & A. Aziz	146, Wellington Street West	Underwear.
Baines & David, Ltd.	100, Esplanade	Iron and Steel, Metals.
Richard L. Baker & Co.	84, Wellington Street West	Underwear, etc.
Barrymore Cloth Co., Ltd..	1179, King Street West	Wool.
Belding Corticelli, Ltd.	79, Wellington Street West	Artificial Silk, Dyestuffs, etc.
George Borgfeldt & Co., Ltd.	58, Front Street West (Birmingham: 39½, Moor Street.)	Fancy Goods.
H. C. Boulter & Co., Ltd.	445, King Street West	Serges.
The Bowes Co., Ltd.	58, Wellington Street East	Groceries.
A. Bradshaw & Son	25, Wellington Street West.	Dry Goods and Men's Furnishings.
The W. R. Brock Co., Ltd..	60-68, Bay Street (London: 35, Milk Street, E.C. 3.)	Dry Goods of every descrip- tion.
J. S. Brown & Sons Co., Ltd.	80, Wellington Street West	Linens.
L. P. Burns, Ltd.	301, Bank of Hamilton Building.	Machinery.

Names of Firms.	Street Address.	Business.
Cockburn & Bundy, Ltd. .	71-73, York Street . (London : 35, Milk Street, E.C. 3.)	Millinery.
John Catto, Ltd. .	Yonge and Shuter Streets.	Dry Goods.
Wm. Croft & Sons, Ltd. .	436-438, Wellington Street West.	Smallwares.
E. S. Currie & Co., Ltd. .	54, York Street .	Hosiery.
Debenhams (Canada), Ltd..	66, Wellington Street . (London : 15, St. Paul's Churchyard West, E.C. 4.)	Silks, Laces, etc.
The Dominion Machinery Co., Ltd.	110, Church Street .	Machinery.
Eby-Blain, Ltd. .	21-23, Front Street East .	Groceries.
H. P. Eckardt & Co..	1-7, Church Street .	Groceries.
Fairweathers, Ltd. .	88, Yonge Street .	Ladies' and Gents' Furnishers.
Gordon & Gotch, Ltd. .	136, Bay Street . (London : 15, St. Bride Street, E.C. 4.)	Books and Stationery.

Gordon, Mackay & Co., Ltd.	48-58, Front Street West . (Manchester: 56, Bloom Street.)	Dry Goods.
John C. Green & Co., Ltd..	70-72, Wellington Street West.	Millinery.
John Hallam, Ltd. . .	111, Front Street East .	Sporting Goods, etc.
J. F. Hartz Co., Ltd.. .	27, Hayter Street . .	Instruments and Chemicals.
Alfred Herbert, Ltd. . .	1-3, Jarvis Street . .	Machine Tools.
	(London: 25, Victoria Street, S.W. 1.)	
House of Hobberlin, Ltd. .	151, Yonge Street . .	Tailors' Supplies.
Hobbs Hardware Co., Ltd. (of London, Ontario).	55, Colborne Street . .	Hardware.
Wm. Hollins & Co., Ltd. .	60, Front Street West .	Woollens.
	(London: 24, Newgate Street, E.C. 1.)	
Holt, Renfrew & Co., Ltd..	118, Yonge Street . .	Ladies' and Gents' Furnish- ings.
H. S. Howland, Sons & Co., Ltd.	138, Front Street West .	Hardware.
The Irving Umbrella Co., Ltd.	79-83, Wellington Street West.	Umbrella Materials.

Names of Firms.	Street Address.	Business.
The John B. Keeble Co., Ltd.	35, Colborne Street . (London : 1, Arundel Street, W.C. 2.)	General Merchants.
W. R. Johnston & Co., Ltd.	Front and York Streets .	Woollens.
The Kennedy Hardware Co., Ltd.	51-55, Colborne Street .	Hardware.
E. Leadley & Co. .	87, Front Street East .	Wools, Hides, etc.
Rice Lewis & Son, Ltd. .	19, Victoria Street .	Hardware.
The Lowndes Co., Ltd. .	142-144, Front Street West.	Clothiers' Requisites.
	(London : 56, Alderman- bury, E.C. 2.)	
Lyons & Marks .	38, Yonge Street .	Hardware.
McDonald & Wilson, Ltd. .	347, Yonge Street .	Electrical Goods.
John Macdonald & Co., Ltd.	21-25, Wellington Street . (Manchester : 84, George Street.)	Dry Goods.
S. F. McKinnon & Co., Ltd.	110, Wellington Street West.	Textiles.
	(London : 35, Milk Street, E.C. 3.)	

Michie & Co., Ltd. .	7, King Street West .	Groceries.
Marshall & Harding, Ltd. .	60, Front Street West .	Headgear.
Marshall, Son & Bunney .	39, Richmond Street East .	Tool Steels, etc.
Middows Bros. & Co., Ltd..	81, Victoria Street . .	General Merchants.
	(London: Chichester Chambers, Chancery Lane, W.C. 2.)	
Monypenny Bros., Ltd. .	84-86, Wellington Street West.	Woollens.
The Murray-Kay Co., Ltd..	17-27, King Street East .	Department Store.
Nisbet & Auld, Ltd. . .	32-34, Wellington Street West.	Tailors' Supplies.
Northrop & Lyman Co., Ltd.	462, Wellington Street West	Chemicals and Drugs.
Olivier & Co.	59, Wellington Street West (London: 33, Hamsell Street, E.C. 1.)	General Merchants.
T. E. O'Reilly, Ltd. . .	36, Toronto Street . .	Chemicals.
	(London: Mr. Frank I. Hibbert, 21, Hart Street, E.C. 1.)	
The Otto Higel Co., Ltd. .	King and Bathurst Streets	Ivory for Piano Keys.
W. G. Patrick & Co., Ltd. .	51, Wellington Street West.	Groceries.
H. W. Petrie, Ltd. . . .	131-135, Front Street West.	Machinery and Supplies.
A. T. Reid Co., Ltd. . .	274, King Street West .	Piece Goods.

Names of Firms.	Street Address.	Business.
Harold F. Ritchie & Co., Ltd.	10, McCaul Street (London : 33, Farringdon Road, E.C. 1.)	Groceries, Drugs, Hardware, Stationery, etc.
Rogers Frankfort Co., Ltd. Julian Sales Leather Goods Co., Ltd.	107, Simcoe Street 105, King Street West	Piece Goods. Leather Goods.
Sales, Ltd.	384, Yonge Street (London : 34, Imperial Buildings, Ludgate Circus, E.C. 4.)	General Merchants.
M. & L. Samuel, Benjamin & Co.	431, King Street West (London : Samuel, Sons & Benjamin, 16, Philpot Lane, E.C. 3.)	Metals, etc.
Silks, Ltd. A. G. Spalding & Bro. L. R. Steel & Co., Ltd. Stewart & McDonald, Ltd..	100, Wellington Street West 207, Yonge Street Royal Bank Building 64, Wellington Street West. (Glasgow : 146, Argyle Street.)	Dry Goods and Novelties. Sporting Goods. Five-cent to \$1 Stores. Dry Goods.
Stewart Menzies & Co.	32, Front Street West	Groceries.

Sturgeons, Ltd.	91, Church Street (London : Mr. George Sturgeon, 24, East- cheap, E.C. 3.)	Painters' Supplies.
Vokes Hardware Co., Ltd.	40-42, Queen Street East	Hardware.
Mr. W. C. B. Wade	76, Bay Street	Toy sand Fancy Goods.
	(London : Whitehall House, Westminster, S.W. 1.)	
Welch, Margetson & Co., Ltd.	63, Bay Street	Men's Furnishings.
A. R. Williams Machinery Co., Ltd.	64-66, Front Street West	Machinery.
R. S. Williams & Sons Co., Ltd.	145, Yonge Street	Musical Goods.
Wreyford & Co.	85, King Street West	Men's Furnishings.
WINNIPEG, MANITOBA.		
The J. H. Ashdown Co., Ltd.	264, McDermot Avenue	Hardware, Electrical Goods, etc.
The Donald H. Bain Co., Ltd.	113-115, Bannatyne Avenue East. (London : Saracen's Head, Snow Hill, E.C. 1.)	Groceries.

Names of Firms.	Street Address.	Business.
Bryce & Co., Ltd. . Clare Bros., Western, Ltd. . The Codville Co., Ltd. . The Congdon-Marsh Co., Ltd. D. R. Dingwall, Ltd. .	270, Donald Street . 27, May Street . 49, Victoria Street . 86, Princess Street . Paris Building, Portage Avenue.	Dry Goods. Hardware, etc. Groceries, etc. Boots and Shoes. Jewellery, Silverware, etc.
Finnie & Murray, Ltd. .	Corner McDermot and Adelaide Streets.	Men's Furnishings.
The Grain Growers' Grain Co., Ltd.	Grain Exchange Building .	General Supplies.
(Buying Organisation.) Hollingsworth & Co., Ltd. . The Jobin-Marin Co., Ltd. MacLean, Woods, Taylor & MacLean.	286, Portage Avenue. . 162, Market Street . 307, McArthur Building . (London: 154, Fleet Street, E.C. 4.)	Ladies' Wear. Groceries. General Merchants.
The Manitoba Steel & Iron Co., Ltd.	Logan Avenue . .	Machinery, Iron and Steel.
The Marshall-Wells Co., Ltd. Merchants' Consolidated, Ltd.	Market Street . . 110, Princess Street . .	Hardware. Underwear, etc.

Merrick, Anderson & Co., Ltd.	117, Bannatyne Avenue East.	Hardware.
The Miller-Morse Hardware Co., Ltd.	317, McDermot Avenue .	Hardware.
Peace & Co., Ltd. .	260, Portage Avenue. .	Men's Furnishings.
Richardson & Bishop, Ltd..	424, Main Street .	Stationery.
J. Robinson & Co., Ltd. .	398-416, Main Street .	Department Store.
Robinson, Little & Co., Ltd.	54-60, Arthur Street. .	Dry Goods.
	(And at Manchester.)	
Russell, Lang & Co. .	298, Portage Avenue. .	Stationery.
Thomas Ryan & Co., Ltd..	44, Princess Street .	Boots and Shoes.
The Scott-Bathgate Co., Ltd.	149, Notre Dame Street East.	Groceries.
The Scottish Wholesale Specialty Co.	263, Talbot Street .	Clothing, Boots and Shoes.
Stiles & Humphries, Ltd. .	261, Portage Avenue. .	Men's Furnishings.
Tees & Persse, Ltd. .	315, William Street .	Groceries.
Watson & Truesdale .	156, Lombard Street. .	Groceries.
Western Grocers, Ltd. .	116-122, Market Street .	Groceries.
R. J. Whitla & Co., Ltd. .	264, McDermot Avenue .	Dry Goods.
	(Manchester: 56, Bloom Street.)	

Name of Firms.	Street Address.	Business.
The Winnipeg Paint and Glass Co., Ltd. . . Wood, Vallance, Ltd. . .	179, Notre Dame Avenue East. Corner McDermot and Arthur Streets.	Hardware, Paints and Glass. Hardware.
CALGARY, ALBERTA.		
Campbell, Wilson & Horne The Chapin Co. . . The Clarke Brokerage Co. . . Gorman's, Ltd. . .	319, Tenth Avenue West . 320, Eighth Avenue West . Room 802, 622, First Street West. Corner Ninth Avenue and Fourth Street West.	Groceries. Automobiles and Accessories. Groceries, Drugs, Confectionery, etc. Mining, Electrical and Steam Machinery, Building Supplies, etc.
McDonald-Cooper, Ltd. . The L. T. Mewburn Co., Ltd. Simington & Co., Ltd. .	Corner Tenth Avenue and Third Street East. 522, Eleventh Avenue West. Corner Tenth Avenue and Fifth Street West.	Groceries. Groceries. Groceries.

The United Grain Growers, Ltd. (Co-operative Dept.)	Lougheed Building . .	Farm Machinery, Imple- ments and Supplies.
L. F. Wilson & Co., Ltd. .	326, Ninth Avenue West .	China and Earthenware.
EDMONTON, ALBERTA.		
Chmelnitzky Wholesale, Ltd.	10350, 97th Street . .	Dry Goods and Men's Furnishings.
The Empire Engineering & Supply Co., Ltd.	10012, Jasper Avenue .	Engineering Supplies.
Johnstone, Walker, Ltd. .	10159, Jasper Avenue .	Department Store.
Kay's, Ltd.	10027, Jasper Avenue . (London : Morum Bros., Ltd., 58, Banner Street, E.C. 1.)	Tailors' Requisites.
James Ramsey, Ltd. . .	10193, 101st Street . .	Department Store.
Reed's Bazaar	10321, Jasper Avenue .	Department Store.
Revillon-Wholesale, Ltd. .	104th Street, Corner 102nd Avenue.	Dry Goods, Hardware, Groceries, Drugs, Paper and Stationery.
The Sommerville Hard- ware Co., Ltd.	10154, 101st Street . .	Hardware.

VANCOUVER, BRITISH COLUMBIA.

Names of Firms.	Street Address.	Business.
The Donald H. Bain Co., Ltd.	365, Water Street (London : Saracen's Head, Snow Hill, E.C. 1.)	Groceries.
Balfour, Guthrie & Co., Ltd.	103-104, Winch Building, 739, Hastings Street West.	Metals, Engineering Supplies, etc.
British Columbia Equipment Co., Ltd.	(London : Balfour, William- son & Co., 7, Gracechurch Street, E.C. 3.)	Machinery and Engineering Supplies.
The British Manufacturers' Corporation, Ltd.	602, Hastings Street West.	General Agents.
Dingwall, Cotts & Co., Ltd.	470, Granville Street (London : 28, Victoria Street, S.W. 1.)	Iron and Steel, Engines, Ropes, Chemicals and General Merchandise.
	414, Pacific Building, 744, Hastings Street West. (London : Cotts, Mitchell & Co., 8, St. Helen's Place, E.C. 3.)	

C. E. Disher & Co., Ltd.	739, Hastings Street West.	Groceries.
Dodwell & Co., Ltd.	525, Seymour Street (London: 24, St. Mary Axe, E.C. 3.)	General Merchants.
F. A. Flett, Ltd.	339, Hastings Street West.	Hardware, Cutlery, Sports Goods, etc.
A. J. Forsyth & Co., Ltd.	626, Pender Street West (Glasgow: Thomas Forsyth & Sons, 30, Mathieson Road.)	Metals, etc.
F. Griffin & Co., Ltd.	702-707, Yorkshire Build- ing. (London: 34, Great St. Helen's, E.C. 3.)	General Merchants.
W. H. Hazlitt & Co., Ltd.	254, Water Street West	Electrical Goods.
The Heaps Commercial Co., Ltd.	837, Hastings Street West. (London: 139, Cannon Street, E.C. 4.)	General Merchants.
Mackay, Smith, Blair & Co., Ltd.	206, Cambie Street	Dry Goods.
McLennan, McFeely & Co., Ltd.	99, Cordova Street East	Hardware.

Name of Firms.	Street Address.	Business.
Milne & Middleton, Ltd. .	347, Water Street . (London : Mr. T. W. Bestall, 42, Finsbury Pavement, E.C. 2.)	Millinery.
National Machinery Co., Ltd.	925, Main Street . (Liverpool : A. Herschell & Co., Ltd., 24, Chapel Street.)	Machinery, Rails, Ropes, Engines, etc.
Nixon & Co., Ltd. . O'Loane, Kiely & Co., Ltd. Simpson, Roberts & Co., Ltd.	301, Cordova Street . Dominion Bank Building . Room 409, 525, Seymour Street. (Liverpool : 46, Stanley Street.)	Dry Goods. General Merchants. General Merchants.
Taylor Engineering Co., Ltd.	850, Hastings Street West.	Electrical Goods.
Charles S. Thompson & Sons.	1150, Hamilton Street .	Hardware.
John W. Thompson & Co..	510, Hastings Street West.	Machinery.

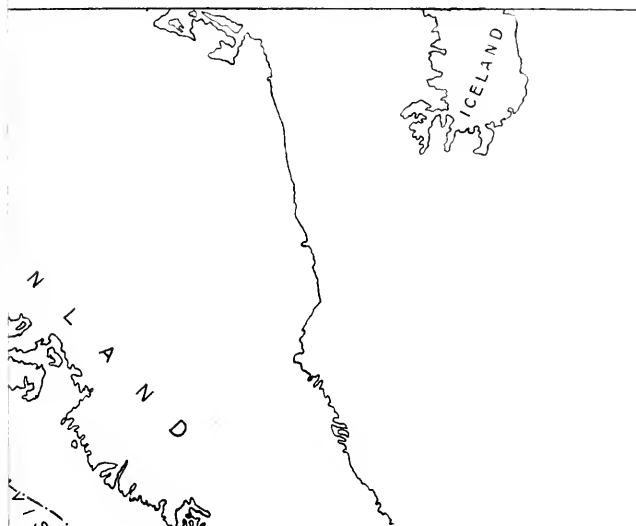
James Thomson & Sons, Ltd.	353, Water Street	Dry Goods.
Wallace, Parsons & Farmer Co., Ltd.	440, Cambie Street	Dry Goods.
The Wilkinson Co., Ltd.	846, Beach Street	Metals.
R. V. Winch & Co., Ltd.	739, Hastings Street West. (London: H. J. Gardiner & Co., 70, Basinghall Street, E.C. 2.)	General Merchants.

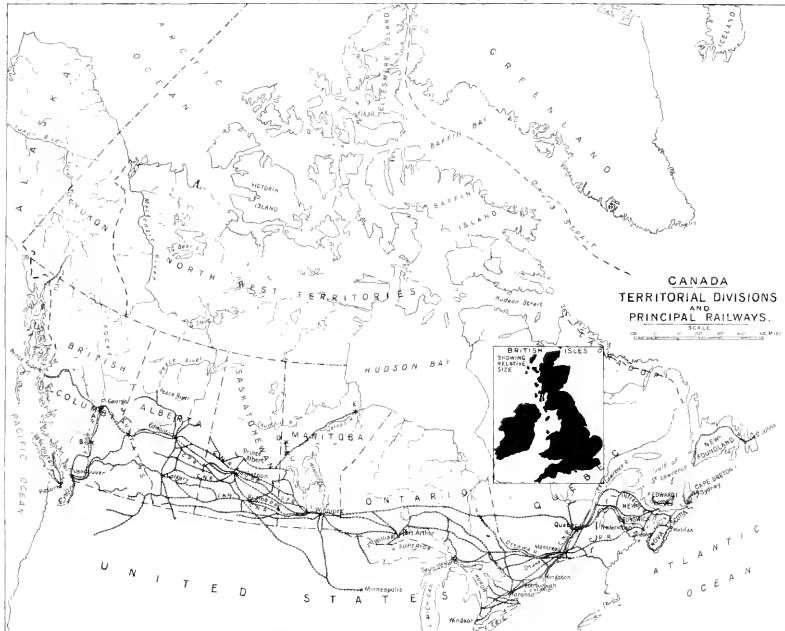
VICTORIA, BRITISH COLUMBIA.

Dodwell & Co., Ltd.	805, Government Street (London: 24, St. Mary Axe, E.C. 3.)	General Merchants.
Findlay, Durham & Brodie.	507-510, Union Bank Building. (London: 110, Cannon Street, E.C. 4.)	General Merchants.
The Hickman-Tye Hard- ware Co., Ltd.	544, Yates Street	Hardware.

Name of Firms.	Street Address.	Business.
E. G. Prior, Ltd. . .	N.E. Corner Government and Johnson Streets.	Iron and Steel, Shelf and Heavy Hardware, Logging and Mining Supplies, etc.
Rithet Consolidated, Ltd. . Turner, Beeton & Co., Ltd..	1117, Wharf Street . . 1232, Wharf Street . . (London : H. C. Beeton & Co., 2, Broad Street Place, E.C. 2.)	Groceries, Logging Supplies. General Merchants.
Weir Machinery Co., Ltd. . W. & J. Wilson . .	1396, Richards Street . 1217-1221, Government Street.	Machinery. Men's Furnishings.

mission of the Controller of H.M. Stationery Office.





NOTE - Railways between A & B, C & D, & C & E are not yet completed

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PROVINCE OF QUEBEC (CANADA)

A Few Figures for the Information of Business Men

MANUFACTURING—Annual value of products \$920,621,171

LIVE STOCK—Annual value \$236,529,000

AGRICULTURE—Field Crops value 1920 \$330,251,000

DAIRYING—Annual production value \$36,784,570

FORESTRY—Annual value of production... .. \$40,761,730

PULP—Annual value of production \$34,167,937

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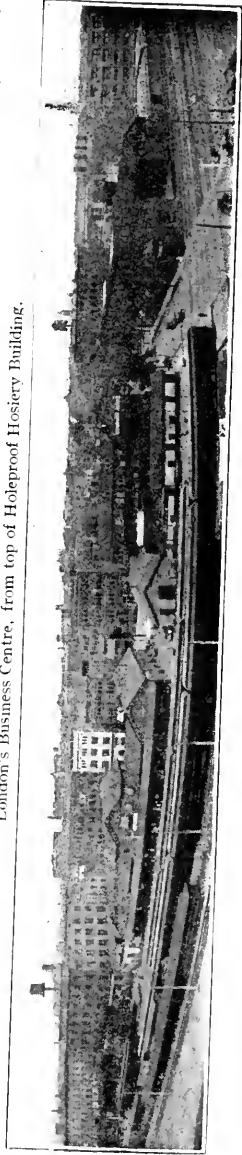
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